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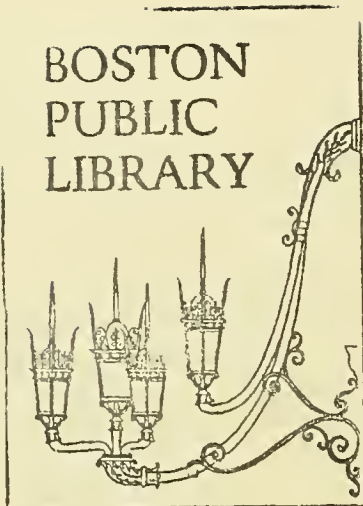
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CHINATOWN

HOUSING IMPROVEMENT PROGRAM



REQUEST FOR PROPOSALS

Parcel R-3/R-3A

Washington Street, Oak Street and Marginal Road

CITY OF BOSTON
RAYMOND L. FLYNN
Mayor

BOSTON REDEVELOPMENT AUTHORITY
STEPHEN COYLE
Director

ROBERT L. FARRELL
Chairman

JOSEPH J. WALSH
Vice-Chairman

JAMES K. FLAHERTY
Treasurer

CLARENCE J. JONES
Vice-Treasurer

MICHAEL F. DONLAN
Vice-Chairman, Sub-Committee

KANE SIMONIAN
Secretary

CHINATOWN HOUSING IMPROVEMENT PROGRAM

REQUEST FOR PROPOSALS

PARCEL R-3/R-3A

WASHINGTON STREET, OAK STREET

AND MARGINAL ROAD

CITY OF BOSTON

Raymond L. Flynn, Mayor

BOSTON REDEVELOPMENT AUTHORITY

Stephen Coyle, Director

Robert L. Farrell, Chairman

Joseph J. Walsh, Vice-Chairman

James K. Flaherty, Treasurer

Clarence J. Jones, Vice-Treasurer

Michael F. Donlan, Vice-Chairman, Sub-Committees

Kane Simonian, Secretary



CHINATOWN HOUSING IMPROVEMENT PROGRAM

REQUEST FOR PROPOSALS

PARCEL R-3/R-3A

WASHINGTON STREET, OAK STREET

AND MARGINAL ROAD

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I.

DEVELOPMENT CONCEPT

The Boston Redevelopment Authority seeks proposals for the development of a multi-family housing development on Parcel R-3/R-3A. Parcel R-3/R-3A is the largest Authority-owned parcel of land in Chinatown. The site consists of approximately 80,000 square feet of land, bounded by Washington Street, Oak Street, Marginal Road and Maple Place (see Exhibit 1, Site Map). With the removal of the elevated tracks of the MBTA Orange Line, the site is now available for development.

The primary goal of the development of this site is to create family housing. The relocation of the South Cove YMCA onto this parcel is also required, as is the provision of adequate parking facilities for the entire project. Other program components should include elderly housing, community service and retail space, and open space.

Development proposals must include a plan to provide at least one-third of the residential units as affordable to low-income households and one-third of the units as affordable to moderate-income households. The project may contain rental, homeownership and/or cooperative housing. Proposals should seek to develop the project in one phase.

Development of this project should expand employment and business opportunities for Boston residents, minorities and women. Selection preference will be given to community development corporations, non-profit organizations, minority business enterprises, or joint ventures of these groups.

DESIGN

Unlike the adjacent neighborhoods of the South End, Beacon Hill, and the North End, Chinatown does not have a predominant building type. At one time Chinatown did have the architectural consistency that these neighborhoods still maintain: a prevalence of four or five story red brick rowhouses with elevated basements and mansard roofs. However, due to commercial and institutional expansion within the community and major public land takings, Chinatown has become a melange of various building types and land uses.

The strength of the community lies in its strong cultural identity. The primary urban design objective for Parcel R-3/R-3A is to create housing that reinforces this cultural identity. Proposals will be reviewed for compatibility with existing use patterns and architecture in areas such as materials, detailing, proportion and other elements that contribute to the distinctive cultural character of Chinatown.

1. Context

The site is located amidst a variety of land uses in Chinatown. Across Washington Street is the Quincy Elementary School and Quincy Tower, a highrise elderly residential tower. Along Oak Street are vacant sites owned by the BRA and Tufts-New England Medical Center, which are planned to support the development of additional medical facilities and residential uses. Three and four story walk-up townhouses exist on Maple Place and around the corner on Pine Street. The Boston Chinese Evangelical Church abuts the parcel at Pine Street and Marginal Road. Across Marginal Road is the Massachusetts Turnpike, which is due to be covered over for air rights development in the 1990's.

Presently, a dilapidated five story building at the corner of Washington and Oak Streets (which is the current home of the Chinatown Boys and Girls Club) and a surface parking lot exist on this site.

2. Uses

The development project must include the following uses:

- o An emphasis on the development of family housing units, i.e. three- and four-bedroom units. Proposals should seek to provide a minimum of 50% of the total proposed units as family housing. A maximum of 25% of the total units should be developed as housing for

the elderly. A minimum of 220 total housing units must be provided.

- o Development proposals must include a plan to provide at least one-third of the residential units as affordable to low-income households and one-third of the units as affordable to moderate-income households (see Appendix A, Affordability Standards).
- o In light of the critical physical condition of the South Cove YMCA, and due to its location on an Authority-owned parcel which is targeted for the development of housing, it is required that the South Cove YMCA be relocated onto this site. A minimum of 25,000 square feet of non-residential space should be set aside for the inclusion of the YMCA.
- o A minimum of .7 parking spaces per dwelling unit must be provided. All parking must be located below grade.
- o Open space must be provided on site. A community garden currently exists on the parcel. Proposals should seek to incorporate the replacement of this garden in the development scheme for the parcel or accommodate its existence elsewhere.
- o If provided, commercial office and/or retail space and community service space should be located on the perimeter of the site at street level. Community service space may be incorporated in a residential building or, depending on its size or specific funding requirements, may be located separately within the site.

3. Density, Height and Massing

- o A total development size of approximately 340,000 gross square feet is requested. The project should attain a floor area ratio of approximately 4.25 (excluding below grade parking).
- o The total space allocated for non-residential uses (which include the South Cove YMCA, other community service space, office and retail space) should not exceed 50,000 gross square feet.
- o The proposed height limit for the Chinatown/South Cove Subdistrict of the Downtown Interim Planning Overlay District is 80'-100', depending on architectural compatibility. A majority of the

project must conform to this height limit. However, due to the extraordinary demand for housing and the location of MassPike Towers (164' high) and Tai Tung Village (110' high) on adjacent blocks, the Authority will consider proposals that allow a portion of the project to be developed at a height not to exceed 155' (see Exhibit 2, Illustrative Sketches).

- o Articulation of the building massing is strongly encouraged. The setback for new construction should match that of existing adjacent buildings at common property lines.
- o Although rooftop mechanical areas are not within the height limits, these areas must be concealed from view and be integrated into the overall building design.
- o Public sidewalks should be repaved, and pedestrian level lighting, street trees and trash receptacles provided.

TRANSPORTATION

1. Vehicular Parking, Access and Circulation

- o A minimum of .7 parking spaces per dwelling unit is required. All parking must be located below grade.
- o The impact of various transportation initiatives and development projects on traffic patterns and volume should be considered in the location of parking entrances. The design and layout of parking entrances and ramps should minimize its visual impact on the site. Efforts should be made to mitigate impacts on public safety and traffic congestion.

2. Service Areas

- o Service areas for the project should be inconspicuously located, safe, enclosed and must not detract from views of the development and surrounding streets.

ENVIRONMENTAL GUIDELINES

- o The development should be designed to minimize adverse impacts on the surrounding environment. Particular consideration should be paid to minimizing the shading of public open spaces and abutting residences.

- o In subsequent phases of review, the designated developer will be required to submit an environmental impact assessment and transportation access plan in accordance with BRA Development Review Procedures.

III. SELECTION CRITERIA

The predominant standard to be used by the Authority in its review of proposals will be the maximization of the program objectives of the Chinatown Housing Improvement Program (see Chapter V) and other public benefits. Criteria for review will include:

- o Compliance with the program affordability requirement that one-third of the units are affordable to low-income families; one-third are affordable to moderate-income families; and one-third are market rate (see Appendix A, Affordability Standards).
- o Compliance with the enclosed development and design guidelines.
- o Selection preference will be given to community development corporations, community-based non-profit organizations, minority business enterprises and joint ventures with these groups. Joint venture proposals will be evaluated on the extent to which CDC's, MBE's and non-profit organizations participate in the equity and decision-making roles in the project (see Appendix B, Definition of Terms).
- o The extent to which CDC and MBE contractors are employed in the development-related trades and services in the proposal.
- o Other public benefits offered by the proposed developments including urban design amenities and other neighborhood improvements.
- o Feasibility of carrying out the proposed development.
- o Demonstrated community support and ability to work with community groups.

Development proposals will be reviewed in accordance to BRA Development Review Procedures and Article 31 of the Boston Zoning Code, Development Review Requirements.

IV. BACKGROUND: CHINATOWN COMMUNITY PLAN AND HOUSING IMPROVEMENT PROGRAM

The Chinatown Community Plan

Boston's Chinatown is a dynamic inner city neighborhood situated next to the downtown Financial District and the Midtown/Cultural District. For over a century, Chinatown has served as the residential, commercial and cultural center of New England's Asian population. As the primary point of entry for Asian immigrants, Chinatown has also become the major distributor of services oriented toward this continuous influx of immigrants.

The growing number of commercial, cultural, and social entities located in Chinatown illustrates the growth of the Asian population in Boston and in the New England region. The population of Chinatown has increased despite the lack of available land into which the community can expand. The stabilization and development of adjacent districts, and the public takings of land for major transportation initiatives have produced boundaries within which Chinatown has continued to develop. As a result, Chinatown has become the most densely populated neighborhood in the city, lacking sufficient land to develop additional housing and business opportunities, recreation and open space, cultural facilities, and other community-oriented services.

The current boom in the population of Chinatown, coupled with the economic renaissance of Boston and the New England region, have resulted in competing demands for the use of land within and adjacent to Chinatown. The higher economic value attached to land used for commercial office and research space has left Chinatown vulnerable to the expansion of the adjoining Financial District and to the enlargement of medical and educational institutions within the community.

The recent controversy over the proposed development of a garage within Chinatown by the New England Medical Center has served as a catalyst to galvanize community and public efforts in preserving and enhancing this historic ethnic neighborhood. As a result, the Boston Redevelopment Authority (Authority) and the Chinatown/South Cove Neighborhood Council (Council) have been working together to develop a comprehensive, community-based master plan for Chinatown. This master plan, which the Authority and the Council have been developing since July, 1987, is known as the Chinatown Community Plan.

The predominant goal of the Chinatown Community Plan is to ensure the continued viability of the neighborhood by developing a shared vision for Chinatown through a broad-based community

process. The plan will function as a tool to direct future community growth and to manage the impact of development within and adjacent to the neighborhood, thereby upgrading the quality of life for its residents and enhancing an historic and cultural asset to the city and the New England region.

The Chinatown Community Plan seeks to address critical issues facing the Chinatown community today:

- o neighborhood stabilization and expansion;
- o affordable housing;
- o economic diversification and improvement;
- o job access and employment training;
- o traffic and parking management;
- o environmental quality and public image;
- o social service access and capacity;
- o cultural facilities;
- o open space.

The Plan is being developed in two phases. A Draft Plan which documents community consensus on goals, objectives, and policies will be completed at the conclusion of Phase I in March 1988 (see Appendix C, Working Draft, Chinatown Community Plan). The second phase will concentrate on the modification and refinement of the Draft Plan through the feasibility analysis of proposed strategies and actions. The final Chinatown Community Plan is expected to be completed in the summer of 1988.

This planning endeavor coincides with the city's first comprehensive rezoning effort in two decades. In addition to recommending permanent zoning amendments on land use, height, density, and project review and impact management, the Chinatown Community Plan will also explore such possibilities as design guidelines, neighborhood conservation acts, and public improvement programs.

The Chinatown Housing Improvement Program

As part of the Chinatown Community Plan, the Authority and the Council are jointly developing the Chinatown Housing Improvement Program (CHIP). CHIP specifically addresses the most urgent issue facing Chinatown: the need to provide decent, safe and affordable housing within the community. The purpose of CHIP is to develop a program for increasing the supply of adequate housing in and adjacent to Chinatown, through the new construction of housing and through the rehabilitation of the existing stock. The creation of housing will further promote the goal of the Chinatown Community Plan to enhance and stabilize this community. Due to the overwhelming demand for housing in Chinatown, the Authority and the Council are developing CHIP

concurrently with the Community Plan.

The gravity of Chinatown's housing shortage has been substantiated by an Authority housing survey completed in December 1987. The population of Chinatown within the Authority housing survey area has grown from 3700 residents in 1980 to 5100 in 1987, an increase of 38%. During this period, only 70 housing units have been added to the community (an additional 67 units are under construction in the survey area). The median number of rooms per unit is only 4.2, while the median number of occupants is 3.6 persons. The degree of overcrowding is greater than all other neighborhoods in the city; 21% of the housing units in Chinatown meet the standard U.S. Census Bureau definition of overcrowding by housing more than one person per room per unit. Twenty percent of all units have 4 or more adults residing in them.

This severe overcrowding is further illustrated by the determination with which the community has pursued affordable housing in Chinatown. In December 1987, over 900 applications were distributed in two and a half hours for the 20 units available in Tremont Village. Over 2,000 people are currently on waiting lists for a total of 877 units in publicly subsidized housing developments in Chinatown. The waiting list for these projects is approximately 6-8 years.

The Authority recognizes the necessity to provide housing, particularly that which is affordable to low- and moderate-income families. In a memorandum sent to the Council and the New England Medical Center on June 12, 1987, the Authority affirmed its commitment to this goal by stating that "Chinatown is a neighborhood in which the paramount land-use objective is increasing the supply of affordable housing...the construction of new affordable housing must be the top priority in city land disposition decisions."

To this end, the Authority has set aside all five of its properties in Chinatown for the development of affordable housing. These sites are Parcels R-1, R-3/R-3A, P-2, P-3 and a portion of P-12. The Authority and Council are currently formulating a development program for these parcels. The Authority has produced conceptual design schemes and preliminary financial feasibility studies of two sites that are the most readily developable. These sites, Parcels R-3/R-3A and R-1, can potentially provide for the development of 300 housing units; in total, CHIP aims to provide 500 units of housing in Chinatown (see Appendix D, CHIP Preliminary Development Program).

To advance the goals of the Chinatown Community Plan and the specific objectives of CHIP, the Authority now releases a Request For Proposals for the development of affordable housing on the first CHIP site, Parcel R-3/R-3A.

V. PROGRAM OBJECTIVES

The Authority and the Council intend to address several long-standing community issues through CHIP. These issues include: the creation of affordable housing; increasing the capacity of and development opportunities for Minority Business Enterprises, Community Development Corporations, and other community-based non-profit organizations; the creation of open and recreational space; the creation of community service space; and the creation of local employment opportunities. CHIP will serve as the magnet to draw together public and private resources to address community needs.

Creation of Affordable Housing

The basic objective of CHIP is to create affordable rental and homeownership opportunities for families, while protecting current residents from displacement. CHIP is designed to achieve the maximum amount of affordable housing that is financially feasible within the planning guidelines required by the community, the constraints of available resources, and the current Chinatown residential market.

CHIP is expected to create approximately 500 units of housing. The program requires that, of these units, one-third be affordable to low-income families; one-third be affordable to moderate-income families; and one-third be market rate. Federal regulations for the Department of Housing and Urban Development currently define low-income families as those that earn less than 50% of the Boston SMSA median family income, and moderate-income families as those that earn 50-80% of the Boston SMSA median family income.

According to a study completed by the Authority in 1985, Chinatown was found to have the lowest median income of all of Boston's neighborhoods. Efforts will be made through CHIP to provide housing that is affordable to those families living at or below the poverty level.

The program encourages the development of homeownership and cooperative ownership of housing.

Increasing the Capacity of and Development Opportunities for Minority Business Enterprise, Community Development Corporations, and other Community-Based Non-Profit Organizations

CHIP seeks to maximize the participation of Minority Business Enterprises (MBEs), Community Development Corporations (CDCs), and other community-based non-profit organizations. The program will utilize publicly-owned land and other public resources to

increase their equity participation and access to development opportunities. CHIP will give priority consideration to MBE's, CDC's, community-based non-profits organizations, and joint ventures with these groups.

The Authority will provide technical assistance in development-related areas to MBE's, CDC's, and non-profits. MBE and CDC contracts in trade-related industries will also be encouraged.

Creation of Open and Outdoor Recreational Space, and Community Service Space

The Authority and Council agree that the development of housing deserves the highest priority for land use decisions. However, the development of housing should not preclude the provision of space for other uses beneficial to the community. Chinatown lacks sufficient open space, indoor and outdoor recreational space and community service space. The larger CHIP development sites, particularly Parcel R-3/R-3A, should provide for the inclusion of such space.

Creation of Local Employment Opportunities

The planning, design and construction of housing through CHIP should create employment opportunities for the Asian community. Outreach efforts and job training programs should be targeted to the Asian community. The timing of these programs should be coordinated with the development of CHIP sites. Local employment opportunities in every aspect of the development process is encouraged.

All City residency and affirmative action guidelines must be adhered to.

VI. SUBMISSION REQUIREMENTS

This Request for Proposals (RFP) is open to all development entities. Proposals that include community development corporations, non-profit organizations, and minority business enterprises as equity partners are preferred.

All applicants are requested to submit five copies of submission materials no later than 5 p.m. on June 14, 1988 to:

Stephen Coyle, Director
Boston Redevelopment Authority
One City Hall Square
Boston, Massachusetts 02201

For question regarding the submission requirements, please contact:

Ronald Fong
Project Manager
Boston Redevelopment Authority
One City Hall Square
Boston, Massachusetts 02201
722-4300, extension 416

Applicant Information

1. Letter of interest which introduces the development team, including the developer, architect, contractor and other consultants. The chief contact person should be listed.
2. Documentation of the extent and nature of participation in the project by Community Development Corporations, Minority Business Enterprises, non-profit organizations or other similar entities. For joint ventures a copy of the Partnership Agreement detailing the amount of control and participation of the parties must be submitted.
3. Description of qualifications, experience, and relevant background; description of functional and legal relationships among team members; description of ability to proceed expeditiously if selected.
4. Redeveloper's Statement for Public Disclosure, and Redeveloper's Statement of Qualifications and Financial Responsibility (Appendix E, Form HUD-6004).

5. Statement of intention to comply with the City's fair housing plan and to prepare an affirmative market plan for the Authority's approval.

Development Proposal

1. Project description, including proposed uses and public amenities, proposed ownership and management structure, anticipated development schedule and, where applicable, proposed subsidy programs involved in either construction or permanent financing.
2. Proposed marketing program for all rental, cooperative and/or for sale units specifying the income groups to which units are to be rented or sold. The City of Boston Fair Housing and Employment Plan (see Fair Housing Requirements, Appendix F) also requires that developers of all projects of five or more units submit an affirmative marketing plan to ensure equal access to the units. The plan should detail outreach efforts including:
 - a. Advertising the availability of housing in majority and minority newspapers, in English, Chinese and Spanish as applicable;
 - b. Sending outreach letters to housing counseling and other agencies that assist low and moderate income and minority families, and undertaking mailings to minority groups potentially interested in the market rate units;
 - c. Undertaking such additional efforts as may be required, due to the specific nature or location of the project (see Informational Summary, Appendix F).

Affirmative marketing efforts should include an informational component which explains alternative housing opportunities in Chinese as well as English. Marketing efforts may extend beyond the Chinatown community to other neighborhoods that contain a large Asian population. It should be noted, however, that the Boston Fair Housing and Employment Plan seeks to ensure that all of the city's minorities and female heads of households have access to housing throughout the city, particularly with regard to affordable housing.

To stabilize neighborhoods and mitigate the effects of displacement and gentrification, a proposal may

target up to 70% of the available affordable units to neighborhood residents. The remaining units must be marketed city wide.

3. Proposals must observe legal requirements which relate to non-discrimination, equal employment opportunity, contract compliance and affirmative action.

An estimate of the number of construction and permanent jobs that will be generated by the development program is required. The designee shall require the contractor and sub-contractors to comply with the Boston Jobs Policy (available upon request) in the hiring for these jobs. The Boston Jobs Policy requires 50% of the total workhours must be filled with Boston residents, 25% by minorities, and 10% by women. An employment plan to that effect will be required of the tentative designee. Consideration will be given to any proposals which seek to employ a substantial number of Asian residents.

The designee shall require commercial tenants to use good faith efforts to comply with guidelines that require 50% of all permanent jobs gained as a result of the development and management of the project be held by Boston residents.

The designee shall comply with the goal of awarding not less than 10% of the general contractor's bid price for minority and women business participation.

4. A plan for the maintenance of open space. This plan should include a schedule for regular cleaning, maintenance, repairs, snow removal, security and any other such service as may be required. The proposal should include a plan to finance these services over time.

Design Submission

1. Site plan(s) at a scale of 1/16"=1'0" illustrating the character and scope of the proposal. The site plan must include the first floor plan and identify pedestrian, vehicular, and service access. Landscaping, ground plane materials and amenities (i.e., benches, light) shall be indicated at indoor and outdoor public spaces.
2. Elevations of all facades of the proposal, including facades of adjacent structures on neighboring blocks up to 250 feet from the project site, to illustrate

the context of the proposal. The elevations must be in sufficient detail to examine the relationships of proposed storefronts, window openings, cornice lines and entrances. The scale of 1/16"=1'0" is requested.

3. Building/site section at 1/16"-1'0" scale illustrating the relation in scale and massing between the proposal and existing buildings immediately surrounding the project.
4. Eye-level perspective views showing the proposal in the context of the surrounding areas.
5. Any additional plan, elevations and sections as may be required to understand the organization of the project.
6. Description of the materials to be used for exterior facades and public spaces.

Financial Submission

1. Development schedule and financial plan.
2. Development and operating pro formas including estimates of operating budgets for condominium associations or cooperative corporations to be developed, as well as any other financial information that may assist the Authority in evaluating proposals. Information provided in narratives and memoranda should correspond to completed pro formas.
3. Letters of interest from financial institutions or source of funding for construction, permanent and/or end-loan financing.

Submission Fee

1. A submission fee of \$100 (cashier's or certified check drawn to order or assigned to the Boston Redevelopment Authority) is required. The Authority is under no obligation to earn interest. Half of the fee (\$50) will be retained by the Authority for processing the submission; the remaining balance will be returned to unsuccessful applicants.
2. Not-for-profit groups may apply for a reduction of the submission upon demonstration of financial hardship.

Development proposals for Parcel R-3/R-3A are due no later than 5 p.m. on June 14, 1988. Upon receiving proposals from prospective developers, the Authority will review the proposals based on the selection criteria outlined earlier. All proposals will be reviewed by and subject to the criteria, procedures, submission requirements, and development and design guidelines outlined in this document.

Following an initial review of the submissions, additional information may be requested from competing teams. All financial information for individual team members will be held confidential.

All development teams submitting proposals will be invited to make a formal presentation to the Authority during the initial phase of the selection process. After reviewing each proposal, the Authority may, at its discretion, select several finalists and request them to develop their proposals further, based on second-stage BRA terms and guidelines.

The Council and the Chinatown community will also review these proposals and make recommendations. Teams will be required to make presentations to the Council with reasonable notice during the review process.

The Authority will grant tentative designation to the developer whose proposal best meets the selection criteria. The tentatively designated proposal will be subject to subsequent stages of BRA development review prior to consideration for final designation. The developer will be required to submit to all applicable state environmental review procedures as well as all development review requirements as defined by Article 31 of the Boston Zoning Code and BRA development review procedures (environmental reviews will include wind and shadow impact analyses, and the submission of a transportation access plan). Tentatively designated teams must meet requirements for final designation within 9 months of tentative designation.

The Authority will sell the parcel to the designated developer at a disposition price based upon appraisals that take into consideration the financial requirements necessary to achieve the desired level of affordable units.

The Authority and the City of Boston will not incur any expenses in the development of this parcel, regardless of the existence of buildings or structures that may be located on the sites. The parcel will be designated in an "as is" condition. The designee

will pay for the cost of any utility relocation not paid by a utility company.

The property will be assessed and taxed by the City of Boston under M.G.L. Chapter 59 real estate assessment procedures.

All applicable city policies will apply to this and all other CHIP parcels, including job policy and fair housing requirements. As part of its policy to assure stable investment in communities, the Authority will submit the names of any person(s) having a financial interest in the project to the City of Boston Arson Commission, the Boston Fair Housing Commission, the Collector-Treasurer's Office, and the Tax Title Division of the City's Law Department. Each department will certify to the Authority that the individual and/or entity is to the best of their knowledge in good standing regarding the issues pertinent to each department.

The provisions of this RFP are severable, and if any provision or provisions shall be held invalid or unconstitutional by any court of competent jurisdiction, such decision shall not impair or otherwise affect any other provision of the RFP.

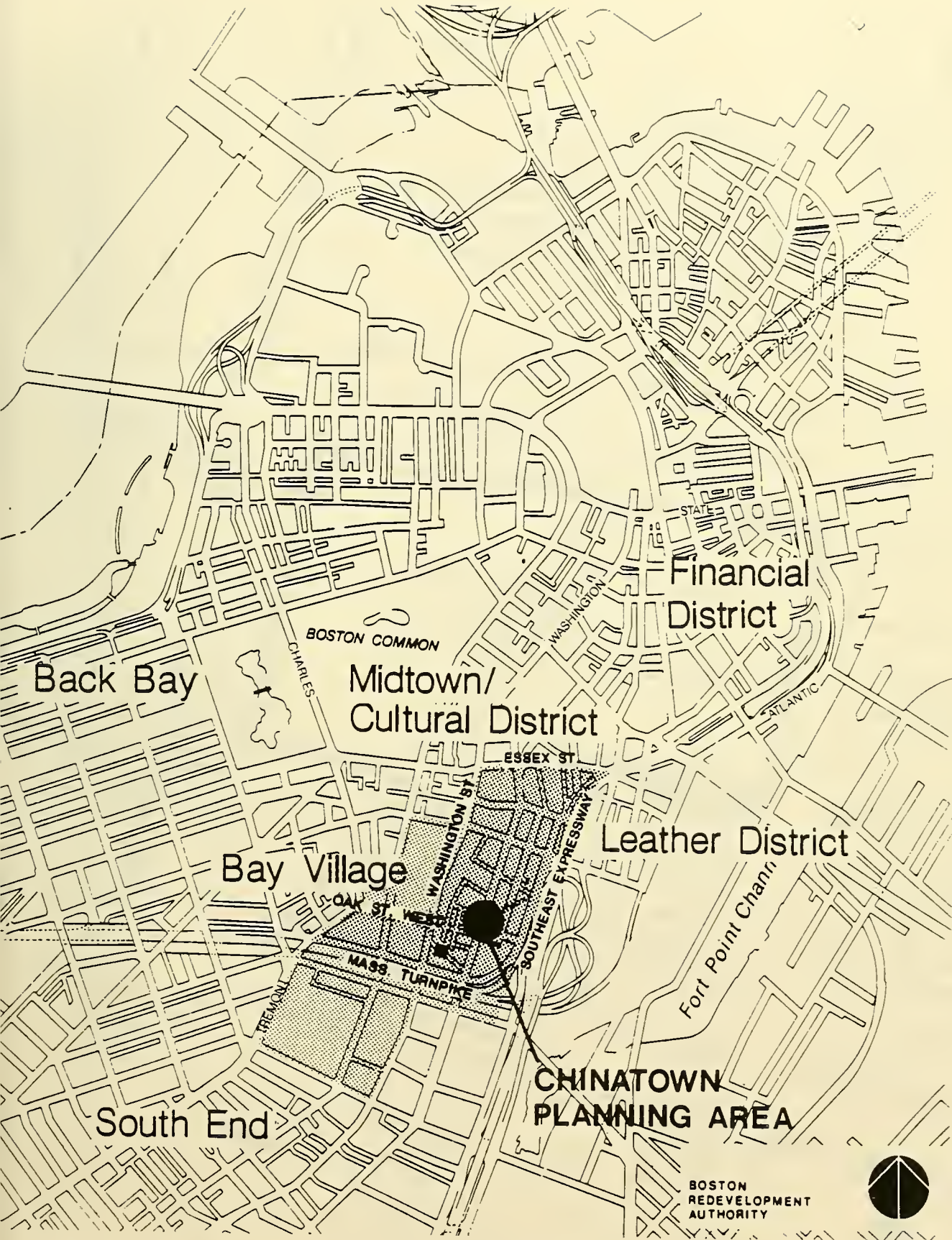
The Authority reserves the right to reject any and all proposals.

VIII.

EXHIBITS

A. Site Maps

B. Illustrative Sketches



Back Bay

BOSTON COMMON

Midtown/
Cultural District

Financial
District

Bay Village

Leather District

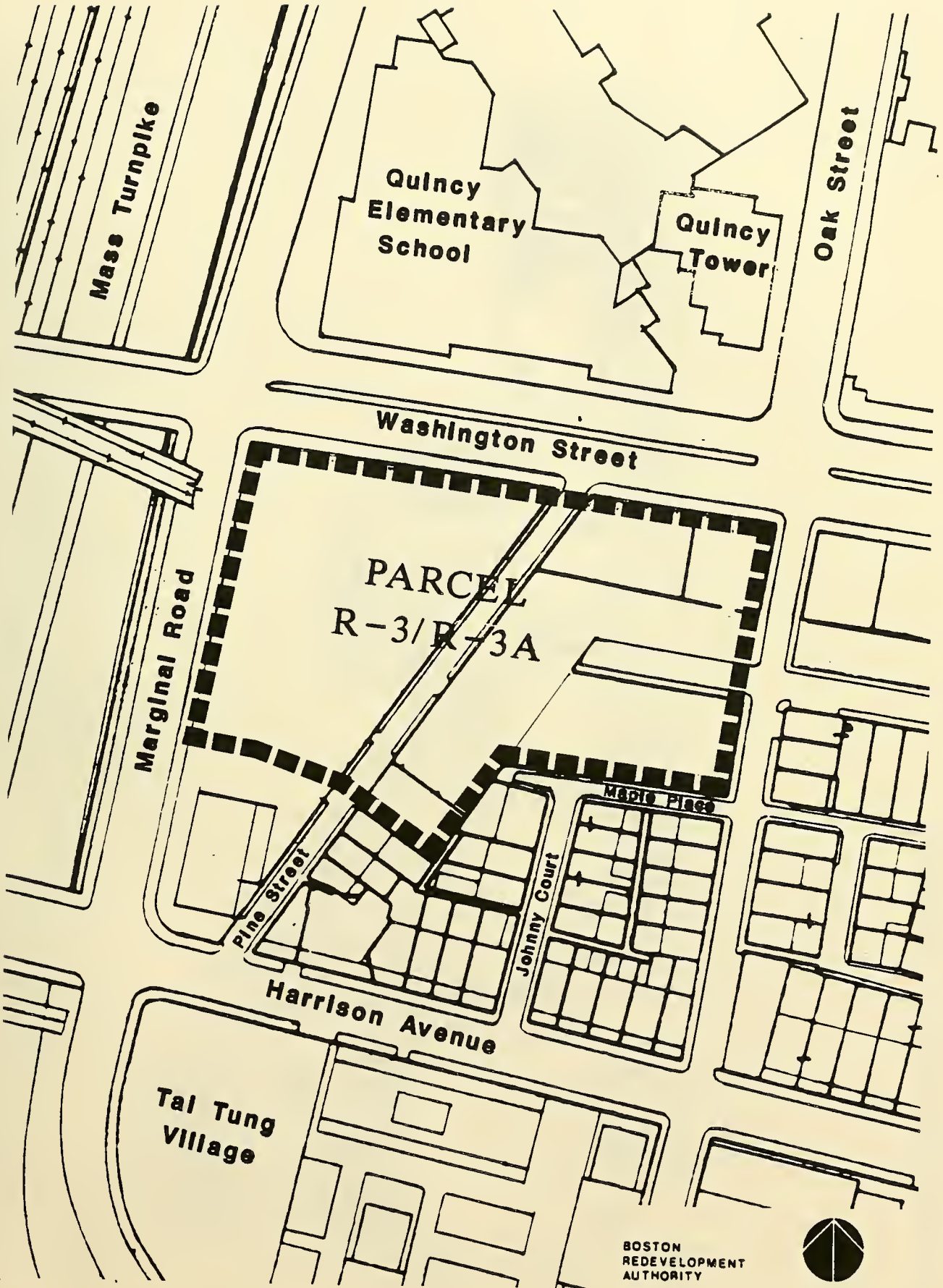
South End

**CHINATOWN
PLANNING AREA**

BOSTON
REDEVELOPMENT
AUTHORITY



■ Parcel R3 - R3a



Mass Turnpike

Quincy Elementary School

Quincy Tower

Oak Street

Washington Street

Marginal Road

PARCEL
R-3/R-3A

Pine Street

Johnny Court

Maple Place

Harrison Avenue

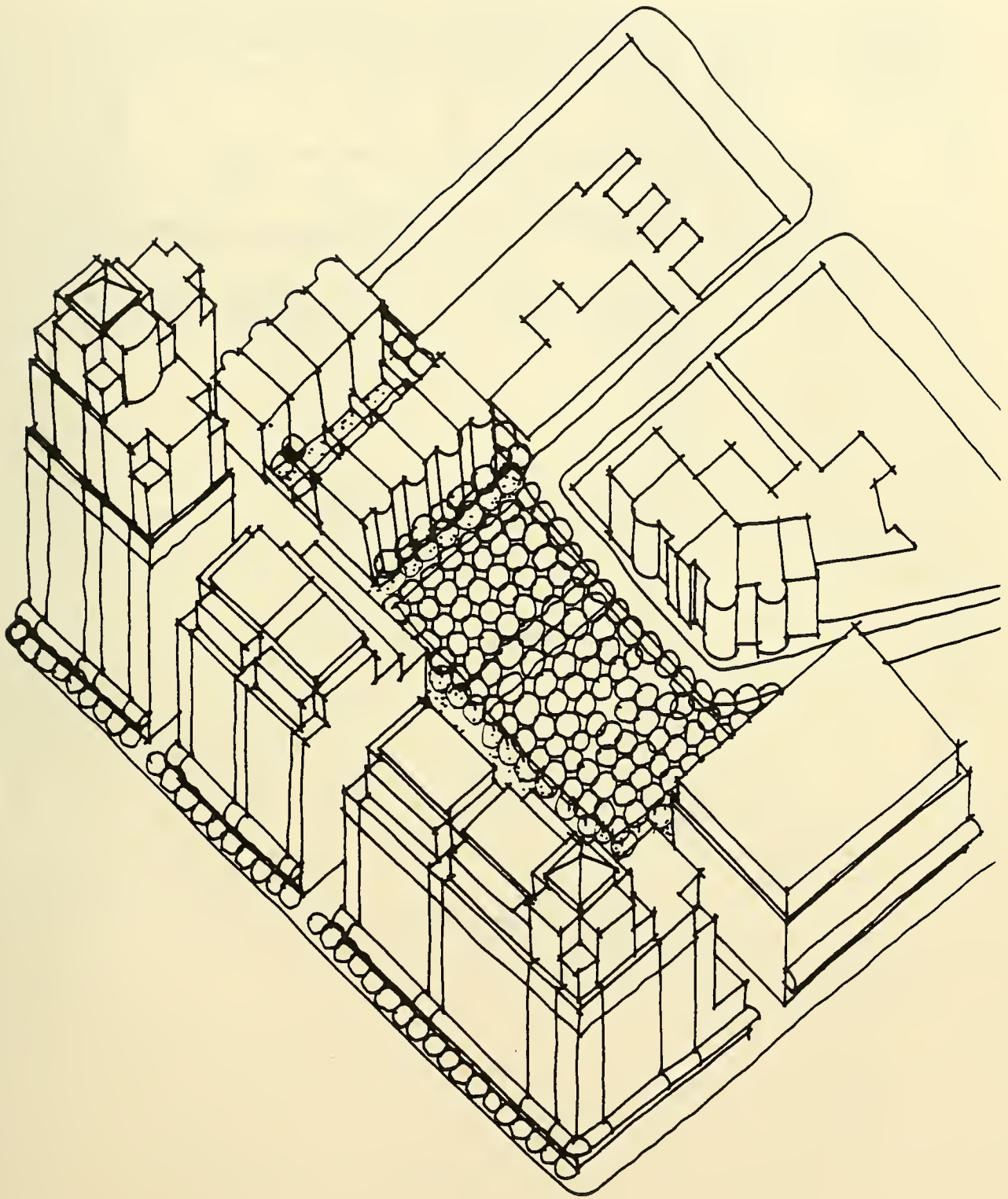
Tal Tung Village

BOSTON
REDEVELOPMENT
AUTHORITY

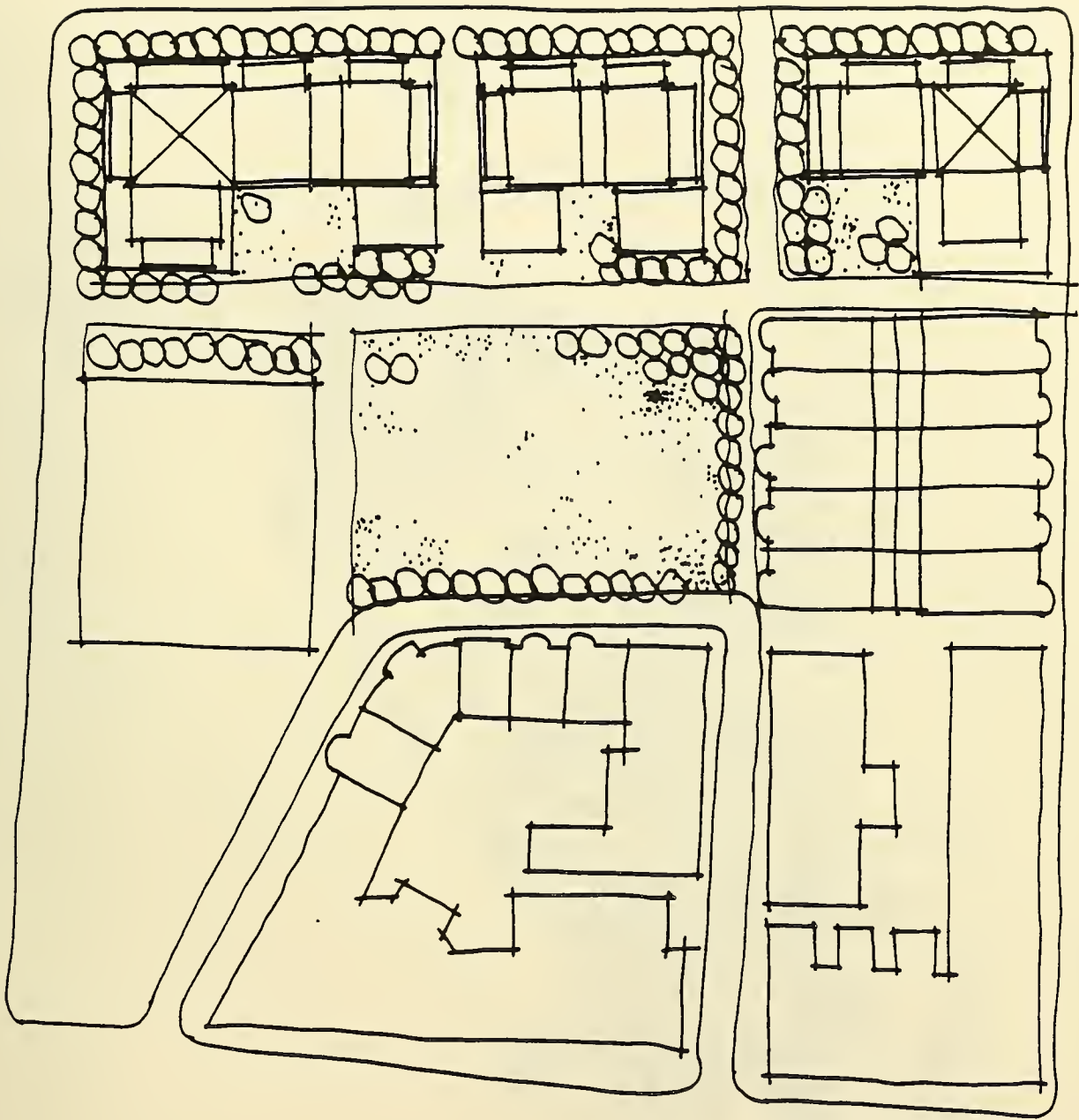




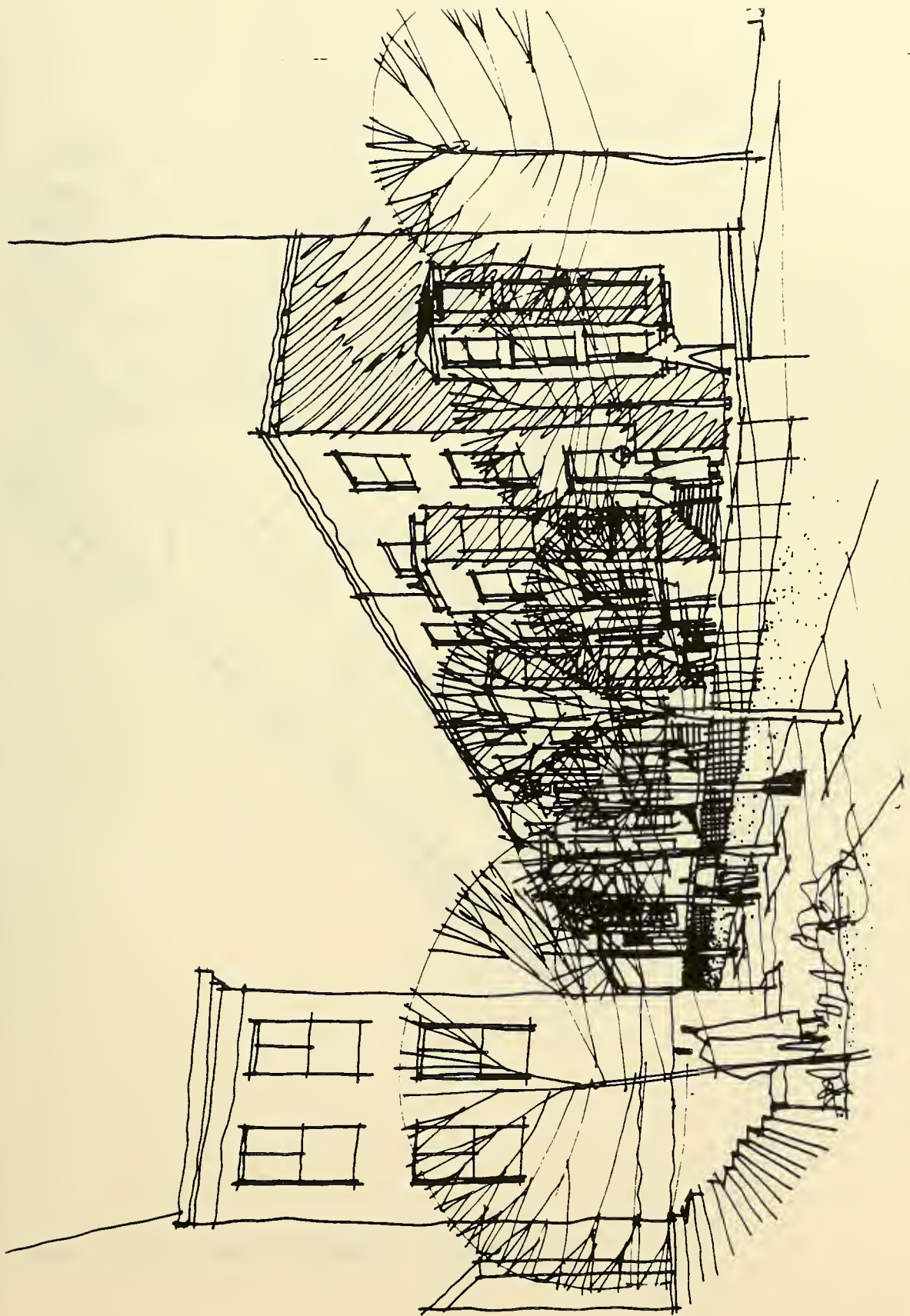
Central Open Space Concept - Perspective



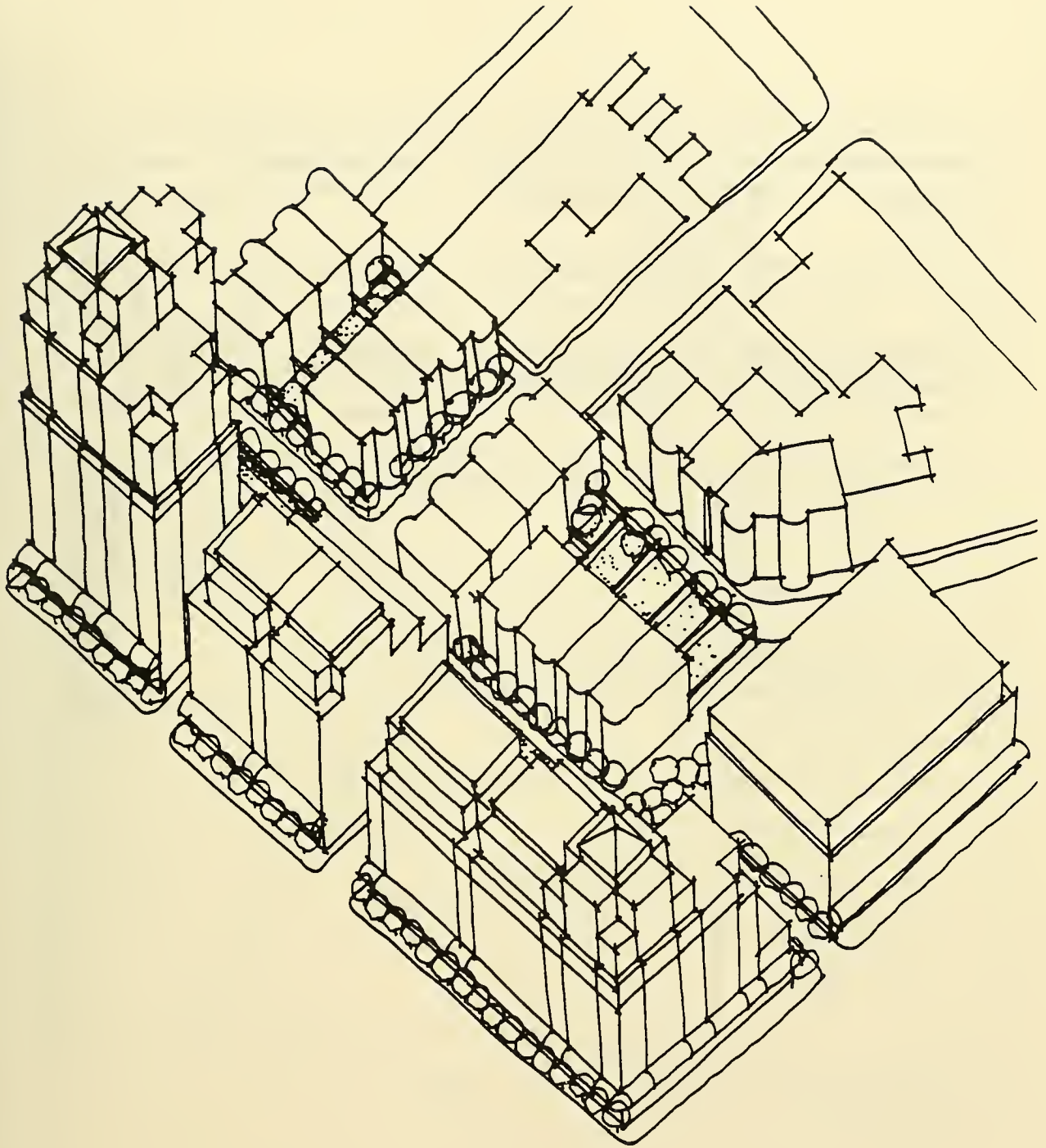
Central Open Space Concept - Axonometric



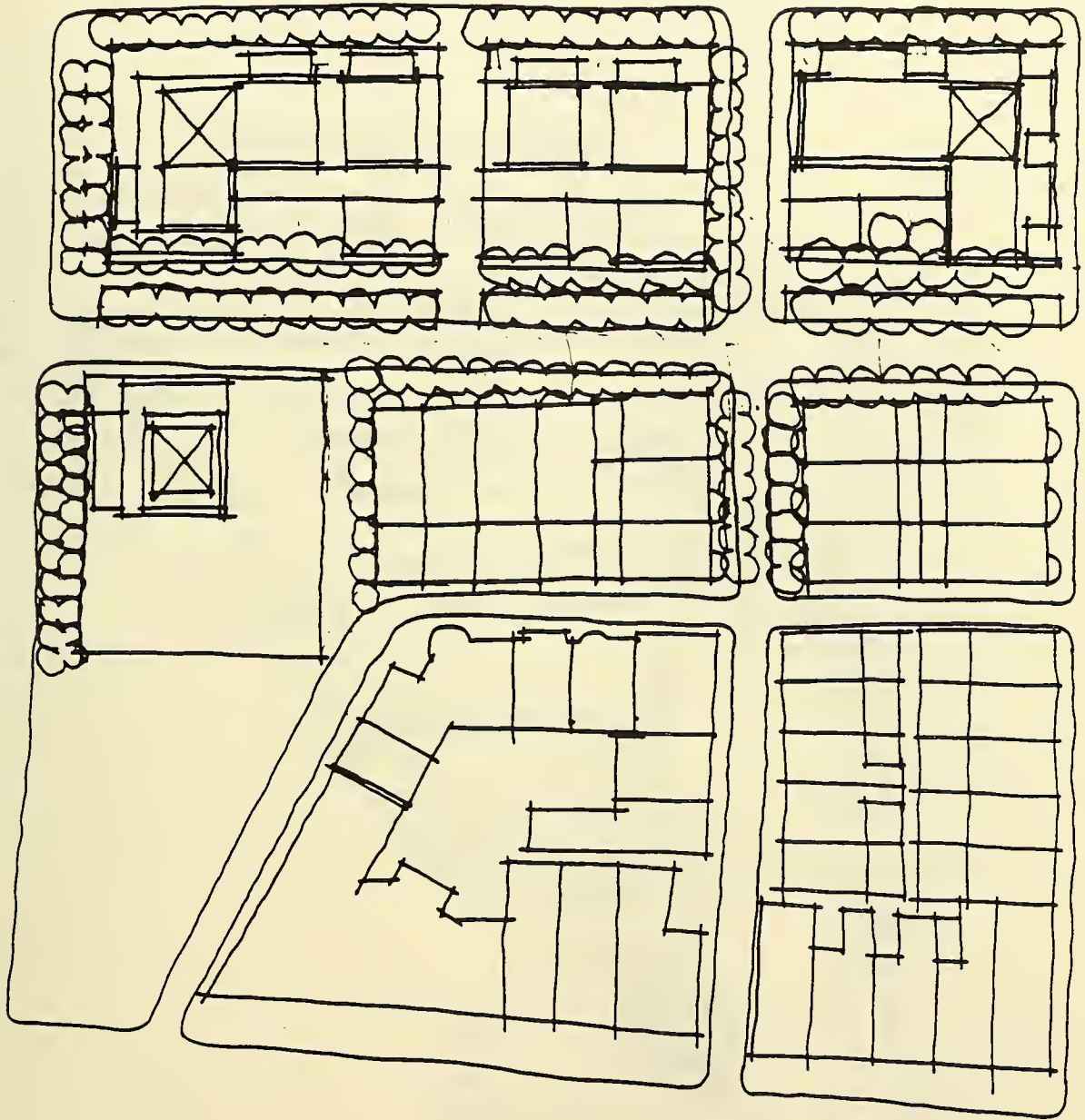
Central Open Space Concept - Plan



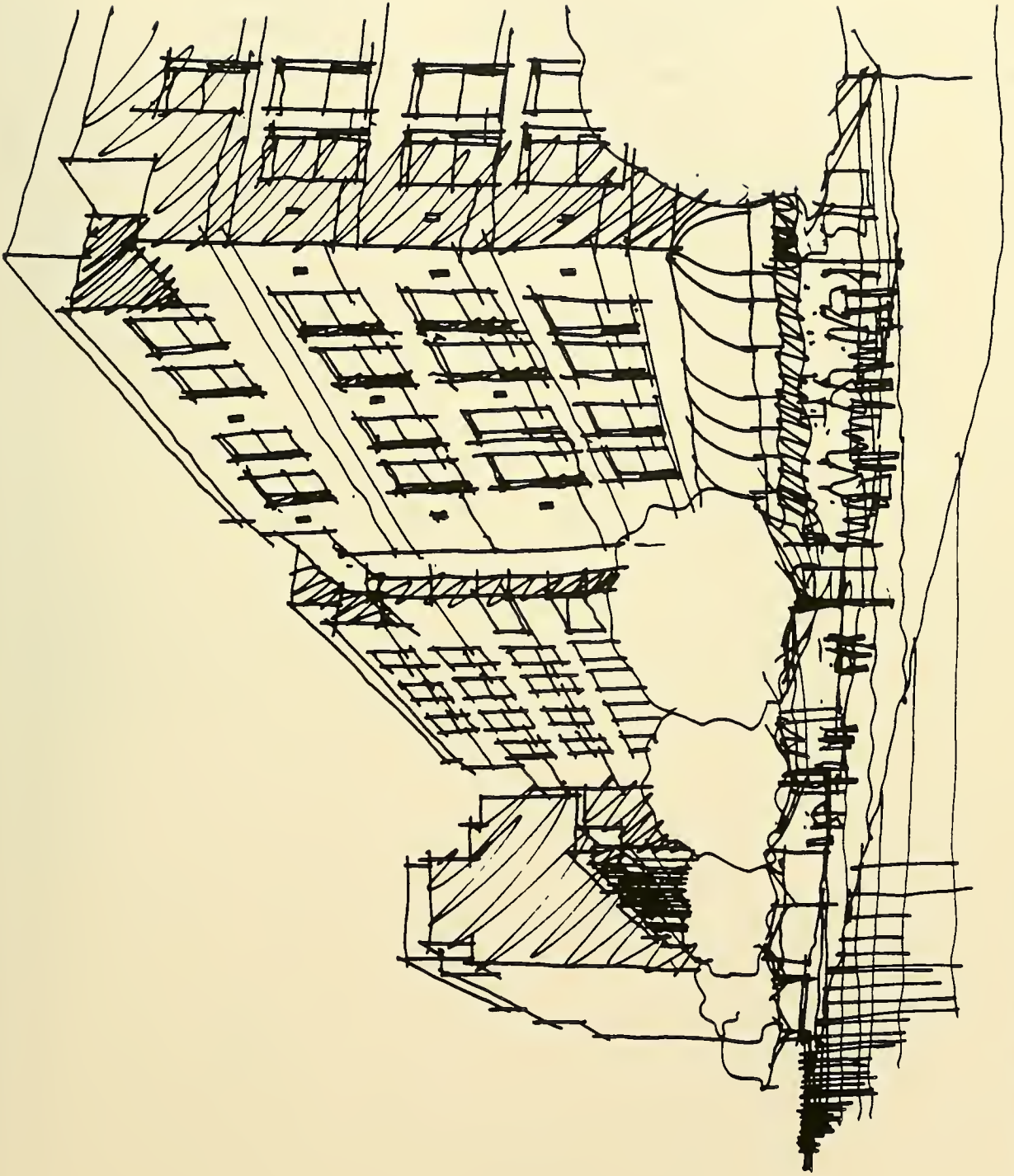
Linear Open Space Concept - Perspective



Linear Open Space Concept - Axonometric



Linear Open Space Concept - Plan



View Along Washington Street

IX.

APPENDICES

Appendix A: Affordability Standards

Appendix B: Definition of Terms

Appendix C: Chinatown Community Plan (Draft)

Appendix D: CHIP Preliminary Development Program

Appendix E: Public Disclosure Forms

Appendix F: Fair Housing Requirements

APPENDIX A

AFFORDABILITY STANDARDS

The following schedules will be used as guides for determining the low- and moderate-income housing generated by development plans. Please refer to the project guidelines where appropriate to determine the number of affordable units and the range of eligibility your development plans must include for approval.

Affordable rents and purchase prices are those which are affordable to a "low" or "moderate" income household paying no more than 30% of their adjusted gross income to rent (including utilities) or mortgage (inclusive of principal, interest, taxes, property insurance, mortgage insurance and condominium fees). Federal regulations for the Department of Housing and Urban Development define these income categories as follows:

"Low-income" = less than 50% of the Boston PMSA median family income.

"Moderate-income" = 50%-80% of the Boston PMSA* median family income.

"Upper Moderate-income" = 80%-110% of the Boston PMSA median family income.

In general, units built to meet the Boston Redevelopment Authority's affordability requirements must be two and three bedroom units unless the City of Boston specifically sets a different standard in a planning document (e.g., Request for Proposals, etc.) or in circumstances where developers can demonstrate a specific neighborhood need for a different unit mix.

The following guide converts the number of persons per household into an appropriate unit size, i.e., number of bedrooms:

<u>Maximum Family Size</u>	<u>Number of Bedrooms</u>
1	0 (studio)
1-2	1
2-4	2
3-5	3
4-6	4
5-7	5

*

Please note that Boston public agencies use 50% and 80% of the PMSA (Primary Metropolitan Statistical Area) median income as guidelines because the median income of Boston residents is substantially lower than that in the PMSA. The median income for Boston families in 1980 was only \$16,062 compared to the PMSA median of \$22,813 according to the U.S. Census. (The PMSA includes many higher income communities from the Greater Boston Area.) Income eligibility limits vary by family size. Attached is a list of income limits for the City of Boston by category and the maximum monthly housing expense acceptable under these guidelines.

AFFORDABLE HOUSING - DEFINITIONS AND GUIDELINES (1)

<u>Family Size</u>	<u>Low Income (Up to 50% of Median)</u>	<u>Maximum Monthly Housing Expense (2)</u>
1	\$15,500	\$388 @30% GMI
2	17,700	443
3	19,950	499
4	22,150	554
5	23,900	598
6	25,700	643
7	27,450	686
8	29,250	731

<u>Family Size</u>	<u>Moderate Income (50% to 80% of Median)</u>	<u>Maximum Monthly Housing Expense (2)</u>
1	\$22,700	\$568 @30% GMI
2	25,900	648
3	29,150	729
4	32,400	810
5	34,450	861
6	36,450	911
7	38,500	963
8	40,500	1,013

<u>Family Size</u>	<u>Upper Moderate Income (80% to 110% of Median)</u>	<u>Maximum Monthly Housing Expense (2)</u>
1	\$31,650	\$791 @30% GMI
2	36,430	911
3	40,690	1,017
4	45,210	1,130
5	48,035	1,201
6	50,860	1,272
7	53,690	1,342
8	56,510	1,413

(1) Effective January 15, 1988.

(2) Maximum monthly housing cost as a percent of gross monthly income (GMI). In calculating possible purchase prices, this amount must include principal, interest, taxes, mortgage insurance, property insurance and any relevant condominium fees. In calculating possible rents, this amount must also include utility costs.

Various financing subsidies use different guidelines for the allowable percent of monthly income. Adjust calculations accordingly. For example, MHFA allows between 28% to 31% of a family's gross monthly income as their maximum allowable monthly housing expense. This range depends on the corresponding tax exempt bond requirement. The Massachusetts Housing Partnership (MHP) Homeownership Opportunity Program (HOP) allows up to 28% of GMI for housing expense. Federal subsidized rental housing programs allow up to 30% of GMI for housing expense. State subsidized rental housing programs allow up to 25% of GMI for housing expense.

APPENDIX B

DEFINITION OF TERMS

Community Development Corporations (CDC):

A CDC is an established non-profit organization that is controlled by residents of a specific community defined by a geographic area, organized for the purpose of community housing and economic development.

Evidence of CDC status is required in the submission.

Minority Business Enterprises (MBE):

MBEs are firms that meet the following criteria and are certified as MBEs by the State Office of Minority Business Assistance (SOMBA):

Owners are members of a definable minority group.

Minority partners/shareholders must own at least 51% of the Business.

Minority owners must have dominant control of the business.

Minority owners must be substantial investors in the business.

The business must be an on-going concern.

Minority shall mean a person who is either Native American /Alaskan Native, Asian/Pacific Islander, Black, Hispanic or a person who is perceived to be of such a group.

MBEs must be certified as having submitted application for certification as of the date of submission. A copy of the MBE certification letter or proof of application from SOMBA must be included in the proposal. Those applicants who wish to compete as MBE's but are denied certification from SOMBA are ineligible for this category in the competition.

Non-Profit Organizations:

Non-profit organizations are those with U.S. Internal Revenue Code 501(c)(3) tax exempt status. A copy of the organization's articles of incorporation and evidence of tax exempt status must be included in the proposal.

Joint Ventures:

A joint venture is a partnership between or among MBEs, CDCs, non-profits and a majority developer in which the MBE, CDC or non-profit has at least 30% control and participation in the decisions and profits of the joint venture as set out in the Partnership Agreement legally defining the joint venture. A copy of the Partnership Agreement must be included in the proposal and will be held confidential.

Female Headed Household:

A female headed household shall mean a household in which the primary adult wage earner or recipient of support in the prior calendar year for that household is female.

APPENDIX C

CHINATOWN COMMUNITY PLAN

(DRAFT)

DRAFT CHINATOWN COMMUNITY PLAN¹

FOR LAND USE

Overview:

Chinatown is geographically bounded by the Massachusetts Turnpike, Southeast Expressway, Boston central business and retail districts and the combat zone (Midtown/Cultural District). In addition, Tufts University School of Medicine and the New England Medical Center are located within the geographic boundaries of Chinatown. Due to a scarcity of land and the strategic location of Chinatown in downtown Boston, Chinatown has had to struggle to preserve its existence for the past three decades.

The issue of land use is critical for the future viability of Chinatown especially in light of the developments occurring within and around the perimeters of the Chinatown community. With the present sympathetic political climate and city support, the Asian community has an opportunity to formally exert its right to ensure the long-term viability of Chinatown through an aggressive and coherent plan for community-based growth.

The Chinatown Community Plan for Land Use seeks to define the where and how for such growth as well as to plan for a better environment for both residents and visitors.

¹. The Chinatown Community Plan is being conducted jointly by the Chinatown-South Cove Neighborhood Council and the Boston Redevelopment Authority in two phases. The draft Plan which concludes Phase I of the planning process entails community consensus on overall goals, objectives, and policies. Feasibility study and public discussions will ensue during Phase II and result in a community-based comprehensive development plan for the Chinatown neighborhood.

DRAFT CHINATOWN COMMUNITY PLAN FOR LAND USE

Overall Goals:

- 1) Preserve and expand the residential, commercial, cultural and community service base of Chinatown
- 2) Serve the future growth and vitality of the Asian community

OBJECTIVE 1: Stabilize the residential and business core of Chinatown

Policy 1: Reinforce Chinatown as a distinct historic and cultural entity.

Explore and evaluate district-wide designation such as Chinatown Historic Neighborhood or Chinatown Special District as a comprehensive way to preserve and enhance not only the physical or architectural attributes of the neighborhood but also the long term vitality of Chinatown as a culturally unique residential and commercial area.

Policy 2: Prevent real estate speculation and direct and indirect displacement of residents and local businesses.

In light of the developments occurring around Chinatown, the prospect of increasing land value and subsequent displacement of low-income residents and small businesses is very possible. One way to prevent displacement is to institute protective zoning regulations which contains downtown developments at the perimeters of Chinatown such as downzoning, i.e., lowering development density and height limits. Furthermore, the community should have control of the air rights above the regular zoning limits for community-based development. Prevention of real estate speculation can be implemented through such community control mechanisms as land banking and housing trusts.

Furthermore, any and all jobs, affordable housing units, development opportunities and parking spaces which are temporarily and permanently lost to the community due to downtown developments must be fully compensated and replaced.

OBJECTIVE 2: Expand Chinatown to increase housing, businesses, jobs, services and open space.

Policy 1: While the central area of Chinatown should be retained primarily for community services, local businesses and residential use, future community-based business and office expansion should be directed toward the Midtown area and Leather District and residential growth directed toward the South End over the Massachusetts Turnpike. (Please refer to Land Use maps)

Develop community resources to expand land ownership. Advocate for subsidized retail/commercial and housing in the Midtown area developments to facilitate Chinatown growth. Support joint ventures with community-based development organizations especially if public land is involved. Ensure community access to mixed-income housing, affordable community space, jobs and open space the development of areas surrounding Chinatown.

Policy 2: Establish community control of development rights and programming over the Massachusetts Turnpike between Albany and Tremont Streets and for all surplus land created by the depression of the Central Artery, Third Harbor Tunnel and related public improvements works in the immediate vicinity of Chinatown.

Reach formal agreements with respective public agencies regarding the disposition policies of surplus land and designation of air rights over development. Build working relationships with other communities and coalitions who can assist in gaining community control over future expansion sites such as the Mass Turnpike.

OBJECTIVE 3: Establish community control through monitoring and regulating adjacent downtown development and institutional expansion

Policy 1: Broaden community participation in downtown planning, design and project review.

The Chinatown-South Cove Neighborhood Council or a neighborhood-based entity, which includes resident participation, should be institutionalized with secure funding and staff to manage future community development and monitor future land use. In addition, the staff-capacity and resources of non-profit community organizations and community development corporations should be strengthened.

Policy 2: Subject all future institutional development including new construction, acquisition/rehabilitation and purchase to community review where institutions bear the responsibility of demonstrating its need for expansion.

Evaluations of "highest and best" land use scenarios should be viewed from the perspective of community needs. Any future institutional development must not result in displacement but should, in fact, create community housing, employment and business opportunities and open space.

OBJECTIVE 4: Strengthen Chinatown's neighborhood characteristics and improve the quality of the physical environment

Policy 1: Preserve existing cultural and historical structures and strengthen Chinatown's heritage

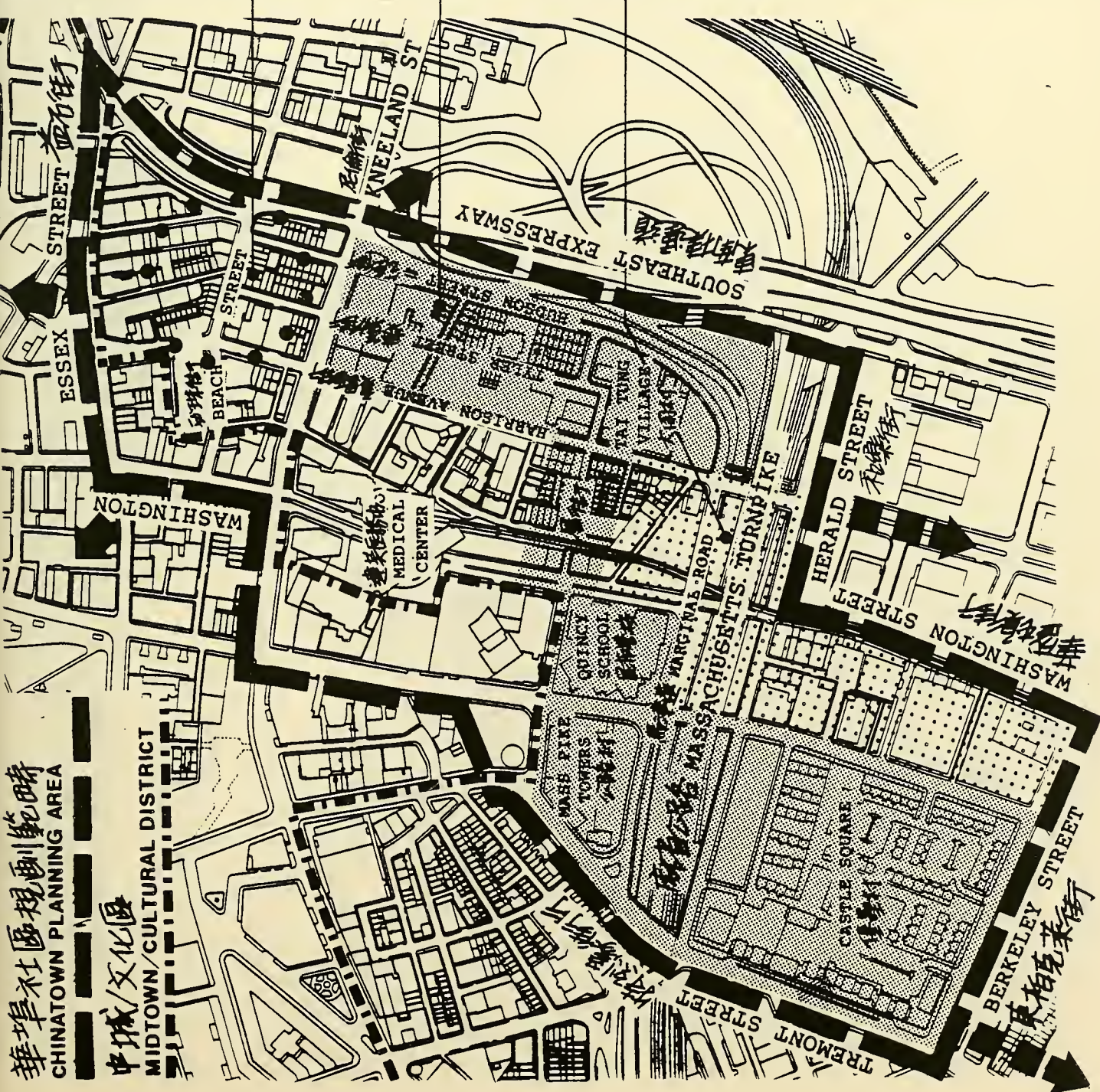
Designation of Chinatown as a historic landmark district should be explored with the intent to reinforce the cultural and social identity of the Chinatown community.

Policy 2: Emphasize Chinatown as a pedestrian oriented neighborhood with a safe and healthy environment for residents and visitors

華埠社區規劃範疇
CHINATOWN PLANNING AREA

LAND USE
DRAFT CONCEPT PLAN

中城/文化區
MIDTOWN/CULTURAL DISTRICT



preserve and upgrade
existing cultural/
commercial core

preserve and reinforce
existing neighborhood
fabric

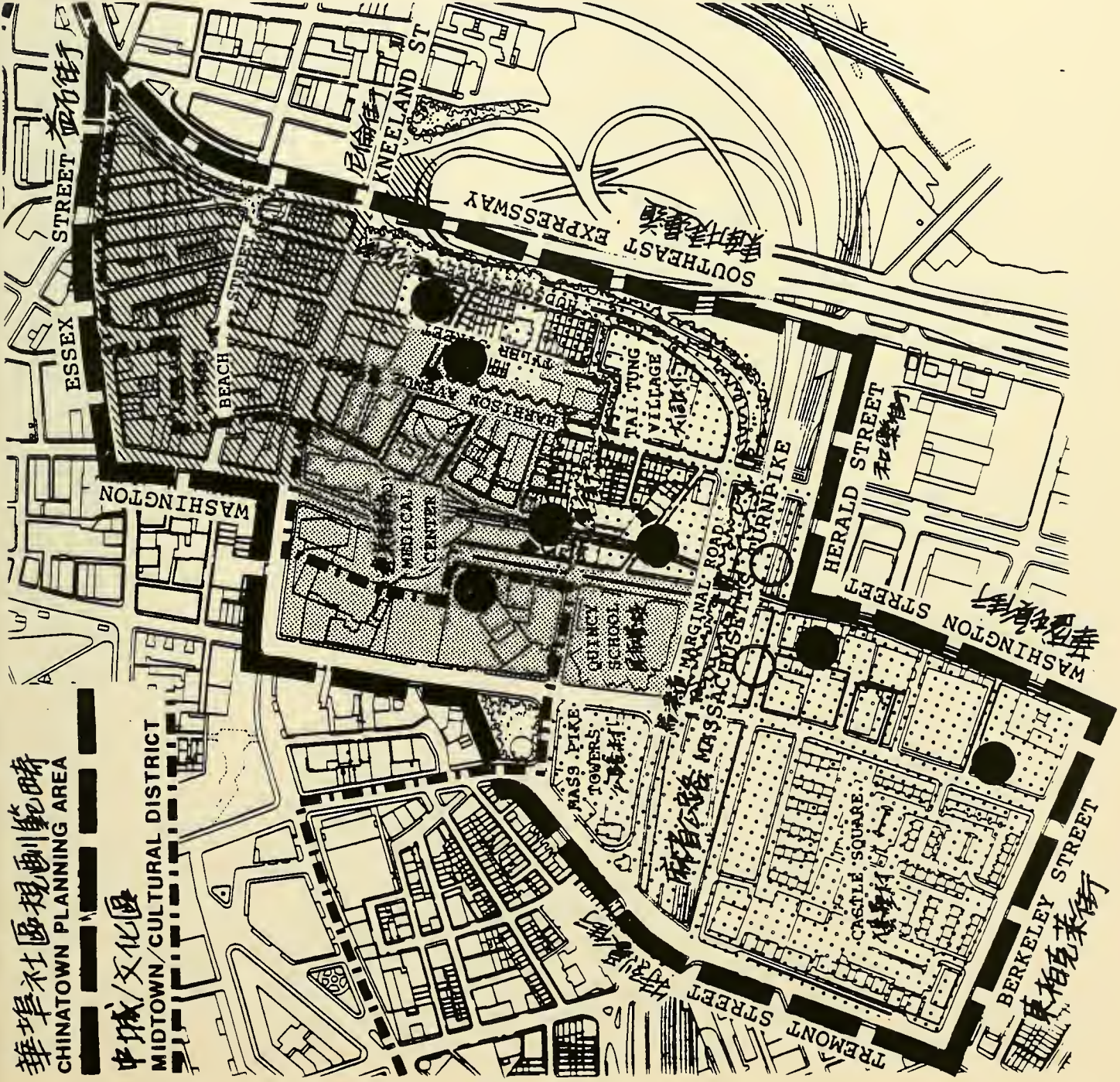
housing development area

↑
expansion area
primarily for
commercial activities

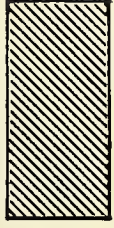
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expansion area
primarily for
housing

華埠社區規劃範疇
CHINATOWN PLANNING AREA

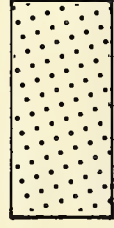
中城/文化區
MIDTOWN/CULTURAL DISTRICT



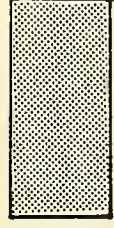
LAND USE
DRAFT
USE REGULATION PLAN



mixed use with
street level retail



housing with provisions
for community space and
street level retail



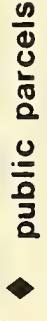
institutional



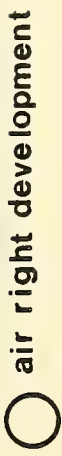
open space and recreation



housing development sites



public parcels



air right development

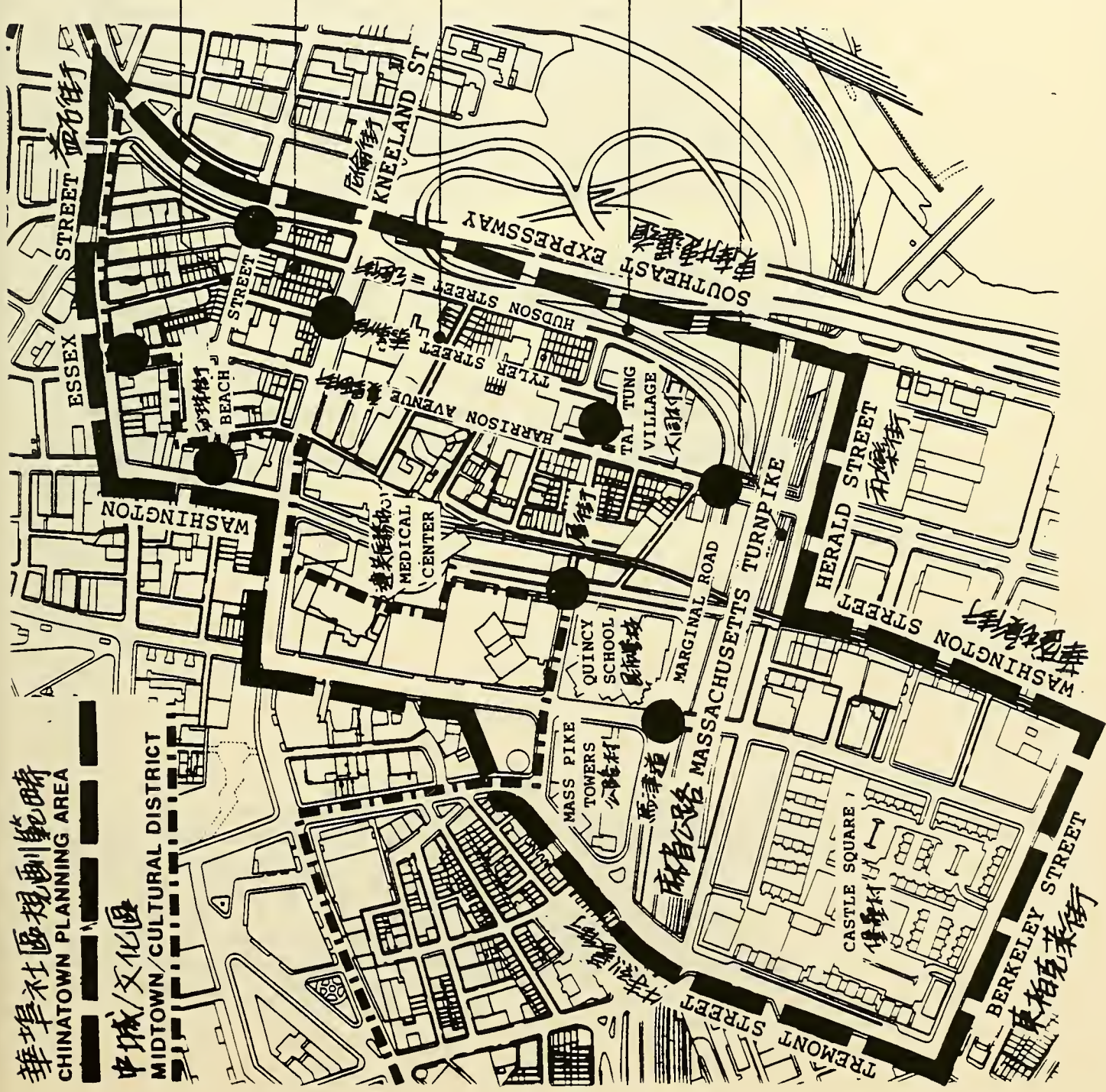
華埠社區規劃範疇
CHINATOWN PLANNING AREA

LAND USE
DRAFT

URBAN DESIGN PLAN

中城/文化區

MIDTOWN/CULTURAL DISTRICT



pedestrianize portion(s)
of beach street

historical preservation
at the core

reinforce residential/
neighborhood
characteristics of
tyler street and
with landscaping

green belt along widened
HUDSON STREET

air right development
over TURNPIKE

critical intersection/corner
increase chinatown's
presence and image
via community spaces
or cultural monuments

DRAFT CHINATOWN COMMUNITY PLAN¹

FOR HOUSING

Overview:

Boston Chinatown is experiencing a severe housing crisis. Since the mid-1970's, the population of Chinatown has increased by twofold however, only 70 units of housing were built during this period. Of the existing housing units, there are very few larger sized units which are suitable for the Asian family structure and life-style. Thus with the continuous influx of new immigrants, most of the housing units are over-crowded and families are forced to moved out of Chinatown in search of decent and affordable housing. In addition to a shortage of housing, existing affordable housing is at risk. Castle Square, a privately owned, publicly subsidized housing development of 500 units of which over 60% are rented by Chinese families, is scheduled for potential conversion to market rate housing in early March.

At the same time that over-crowding and congestion diminish the quality of life in Chinatown, office and institutional expansion threatens the very existence of affordable housing for the Asian community.

The Housing section of the Chinatown Community Plan is an aggressive action plan to stabilize and upgrade the existing housing stock, to dramatically increase the supply and quality of housing, and to enhance community control over housing production in Chinatown.

¹. The Chinatown Community Plan is being conducted jointly by the Chinatown-South Cove Neighborhood Council and the Boston Redevelopment Authority in two phases. The Draft Plan which concludes Phase I of the planning process entails community consensus on overall goals, objectives, and policies. Feasibility study and public discussions will ensue during Phase II and result in a community-based comprehensive development plan for the Chinatown neighborhood.

**DRAFT CHINATOWN COMMUNITY PLAN
FOR
HOUSING**

Overall Goal: Preserve and increase housing supply with priority on affordable and subsidized housing.

Objective 1: Stabilize and upgrade existing housing stock

Policy 1: Protect existing affordable housing stock in and around Chinatown.

Priority must be placed on the preservation of Castle Square and other similar developments as long-term affordable housing. This effort may include supporting state and national legislation and local tenant advocacy organizations. Removal of any existing affordable housing units in Chinatown must be replaced based on a one for one policy. If tenant relocation takes place, all expenses must be provided for and any disruption and inconvenience minimized.

Policy 2: Improve the physical condition of existing housing units.

Priority is to upgrade and improve existing housing in the Chinatown commercial core. Public funds and low-interest bank loans for the private rehabilitation of housing should be provided for. In addition, tenants' participation in the management of existing rental units should be encouraged and assisted.

Objective 2: Increase and expand housing supply with priority on affordable (low-moderate income) housing in and around Chinatown

Policy 1: Lobby for City's and State's initiatives in housing production in and around Chinatown

This policy involves:

a) actively supporting the Boston Redevelopment Authority's plan to build 500 units on the remaining four publicly owned parcels in Chinatown within the next five years.

b) community support of downtown developments that create affordable housing in and around Chinatown through the Housing Creation Option provided in the City's linkage policy.

c) seek City's and State's commitment in granting the community the right to develop housing on potential sites in the vicinity of Chinatown including air rights over the Mass Turnpike and areas in the South End.

d) encourage mixed-income housing development in adjacent areas such as the Midtown/Cultural District and South Station Economic Development Subdistrict

Policy 2: Develop guidelines for housing development which meet community needs and preference

Housing development should provide for a higher percentage of housing for large family households and the elderly. The conversion of underutilized industrial and commercial space for single room occupancy development, congregate housing for the elderly and transitional housing for new immigrants and others who may require short-term housing which integrates social services should be pursued. In addition, zoning regulations in Chinatown business should be amended to encourage mixed-use developments (development which includes housing, retail/commercial and community space).

Objective 3: Expand resources for the development, ownership and maintenance of affordable housing in Chinatown

Policy 1: Maximize all potential funding resources for community-based housing development

To date, the primary funding sources are:

1) Linkage: Actively monitor and advocate for housing linkage contributions through the Neighborhood Housing Trust. Require housing linkage funds generated from the developments in the Midtown/Cultural District to be targeted toward housing development in Chinatown. Require beyond linkage contributions from downtown developers, e.g., any development in the Midtown/Cultural District and the South Station Economic Development Subdistrict which exceeds height and density guidelines must make contributions beyond linkage towards housing development in Chinatown.

2) Explore State and Federal funding such as Massachusetts Housing Finance Agency programs, Urban Development Action Grants, and Department of Housing and Urban Development grant and loan programs.

3) Public/Private Sector Ventures: Encourage the establishment of public and private partnerships to reinvest in the Chinatown community, e.g., work with the Massachusetts Urban Reinvestment Advisory Group to plan and implement creative ways to enforce the

Community Reinvestment Act. Explore alternative incentives and mechanisms for private investment such as tax increment financing. Furthermore, mechanisms should be established to ensure that profits including refinancing from projects created with public/community resources are reinvested into the community.

4) Explore and if appropriate, establish community-based financial institutions such as community credit unions, neighborhood trusts and revolving loan funds and a home equity savings program.

Policy 2: Expand community capacity in developing and managing housing resources

Develop and build up non-profit community organizations and community development corporations' capacity to finance, design, construct and manage housing developments independently or as joint partners with other community non-profit organizations and/or private developers. Institutionalize community participation in the development and review of Request for Proposals' issued for public sites in and around Chinatown.

Policy 3: Increase resources for alternative homeownership by low and moderate income families and individuals.

Design and implement an educational program on alternative forms of homeownership including limited equity cooperatives, deed and resale restrictions which ensure long-term affordability. Affirmative marketing efforts should be an integral component to any educational programs to enhance the access of the Asian community at large to homeownership opportunities. Explore and identify both conventional and innovative funding resources and mechanisms to address the needs of low-income home buyers and beginning CDC's such as initial downpayment and start-up funds. Furthermore, actively seek technical assistance and resources from such organizations as Community Development Finance Corporation, Executive Office of Communities and Development, Greater Boston Community Development, Inc., and the Boston Community Loan Fund.

DRAFT CHINATOWN COMMUNITY PLAN¹

FOR

TRANSPORTATION AND TRAFFIC

Overview

Boston's Chinatown is located next to the central business district. While the neighborhood enjoys convenient services by public transit lines that converge on the vicinity, it is also located at a crossroad of downtown vehicular traffic. Street congestions, parking shortage, poor road conditions, lack of pedestrian safety and comfort have been posing major problems to residents and visitors alike.

The planned development of the nearby Midtown/Cultural District will bring additional traffic and parking demand to an already congested downtown area. Presently, several transportation projects that could have major impact on the neighborhood are also being undertaken by the City and the State, such as the depression of the Central Artery and the construction of the Third Harbor Tunnel, the improvement of the Herald Street corridor, and the downtown circulation plan.

The Chinatown Community Plan for Transportation and Traffic aims to improve the existing traffic conditions and pedestrian environment in the short run, and to control and minimize potential traffic impacts on the residents and businesses over the long run.

¹. The Chinatown Community Plan is being conducted jointly by the Chinatown-South Cove Neighborhood council and the Boston Redevelopment Authority in two phases. The Draft Plan which concludes Phase I of the planning process entails community consensus on overall goals, objectives, and policies. Feasibility study and public discussions will ensue during Phase II and result in a community-based comprehensive development plan for the Chinatown neighborhood.

**DRAFT CHINATOWN COMMUNITY PLAN
FOR
TRANSPORTATION AND TRAFFIC**

Overall Goals:

- (1) Strengthen the connection within the neighborhood and with abutting districts;**
- (2) Upgrade the pedestrian environment;**
- (3) Improve traffic circulation serving residents, businesses, and services.**

OBJECTIVE 1: Control and manage traffic impacts on Chinatown generated from new developments and transportation projects in and around Chinatown.

Policy 1: Future transportation projects shall not result in further land taking from or isolation of Chinatown.

Historically, Chinatown has twice experienced substantial loss of land as a result of major transportation projects, namely the South East Expressway and the Massachusetts Turnpike. In addition to the disruption of the neighborhood environment, Chinatown's connections to surrounding districts including the Leather District and South End were severely damaged.

It is thus essential that similar outcome shall not be repeated again by any future transportation projects such as the Central Artery and Third Harbor Tunnel construction, the improvement of Herald Street Improvement, the Orange Line Transit Replacement Service, the widening of Essex Street and other measures considered for the improvement of downtown circulation.

Policy 2: Encourage the education and active participation of Chinatown in the planning and evaluation of transportation alternatives and related traffic impacts.

Priority should be given to a neighborhood-based transportation and traffic plan which can provide the baseline for the evaluation of future transportation and traffic proposals generated by development.

The Chinatown-South Cove Neighborhood Council or neighborhood-based entity should actively participate in the environmental impact review of transportation proposals to ensure that

Chinatown's interest are effectively protected and advanced in various development projects including the Kingston-Bedford/Essex Street project, Commonwealth Center and other projects in the Midtown/Cultural District.

OBJECTIVE 2: Reduce street congestion and noise and air pollution caused by traffic and parking in and around Chinatown.

Policy 1: Restrict and control regional and by-pass traffic through the Chinatown business and residential cores.

Traffic not destined to Chinatown should be discouraged from using the neighborhood streets such as the closing of the Beach Street ramp. As a result, better circulation can be provided for cars and pedestrians that come to Chinatown for its services, businesses, and other activities.

Policy 2: Provide for deliveries to and pick-up from Chinatown businesses while avoiding conflicts with other traffic and street activities.

Provide convenient deliveries and pick-ups for many of the stores in Chinatown which serve not only neighborhood customers but also the Greater Boston area.

Policy 3: Provide for daily pick-up and drop-off of employees working in suburban Chinese restaurants while alleviating street congestion in the Chinatown central business area

Policy 4: Increase available parking for Chinatown residents, businesses and services

Improve the efficient use of parking facilities to serve the diverse needs of different groups of users such as validated parking in surrounding garages. All new parking facilities should not disrupt the business and residential environment.

OBJECTIVE 3: Provide for safe, convenient, and comfortable pedestrian movement in and around Chinatown.

Policy 1: Upgrade the street environment and support Chinatown businesses.

Pedestrian plaza, street malls, and improved sidewalks can be created where there is a high concentration of pedestrians, such as a Beach Street pedestrian mall and a plaza at the intersection of Essex Street and Harrison Avenue (Phillips Square).

Policy 2: Increase public safety along major pedestrian paths and intersections in and around Chinatown

Priority should be given to pedestrian paths that connect the South End and Chinatown residential area to the Chinatown business core, the Midtown/Cultural District, and the Leather District. These should include streets such as Washington Street, Harrison Avenue, Tyler Street, Oak Street, and intersections crossing Marginal Road/Herald Street, Kneeland Street, Essex Street, and Surface Artery.

OBJECTIVE 4: Provide better transportation services for Chinatown residents, business patrons, service clients, and other visitors

Policy 1: Provide better public transportation services for residents to access areas with major employment opportunities

These employment opportunity areas include South Boston Marine Industrial Park, Crosstown Industrial Park and other proposed development areas.

Policy 2: Improve public safety and comfort at public transit facilities such as better lighting, surveillance and maintenance

Policy 3: Provide bilingual information services on public transportation for Chinatown residents and users

Policy 4: Support innovative transportation management and services such as vanpools, ridesharing, employer-sponsored shuttles, and others.

DRAFT CHINATOWN COMMUNITY PLAN¹
FOR
BUSINESS AND ECONOMIC DEVELOPMENT

Overview:

Chinatown's commercial core is dominated by small businesses such as restaurants, gift shops, bakeries and grocery stores which make up 38% of all businesses in Chinatown. Chinatown's economic base in small enterprises depends not only on resident patronage but on tourist clientele. Critical to the continued success of Chinatown businesses is the need to address immediately such problems as public safety, litter and trash, traffic congestion and parking needs.

Within the broader spectrum of Chinatown economic development, in addition to stabilizing and upgrading the commercial core, this working document addresses the need to diversify Chinatown's economic base and improve the work status and conditions of the Asian/Chinatown labor force.

¹. The Chinatown Community Plan is being conducted jointly by the Chinatown-South Cove Neighborhood Council and the Boston Redevelopment Authority in two phases. The Draft Plan which concludes Phase I of the planning process entails community consensus on overall goals, objectives, and policies. Feasibility study and public discussions will ensue during Phase II and result in a community-based comprehensive development plan for the Chinatown neighborhood.

DRAFT CHINATOWN COMMUNITY PLAN FOR BUSINESS AND ECONOMIC DEVELOPMENT

Overall goals:

- 1) Strengthen and revitalize existing economic base of local businesses and commercial activity
- 2) Diversify neighborhood economy by expanding the types of businesses in Chinatown
- 3) Improve work conditions and status of Asian/Chinatown labor force

OBJECTIVE 1: Revitalize the business/commercial core of Chinatown

Policy 1: Improve public image, physical appearance and utility of the business core

The most immediate aspect of improving the public image of Chinatown involves addressing the garbage/trash/stench problem which plagues Chinatown streets. Local businesses should clean up and maintain their immediate area and/or contribute to a general fund maintain the area. Since littering and improper disposal of residential trash is a large factor of the general garbage problem, public education on littering and trash disposal procedures should be implemented. City service delivery such as residential trash pick up and neighborhood clean ups should be improved. In addition, Chinatown should actively participate in such city programs as the Rodent Control Program.

Enhancing public safety on Chinatown streets is another important factor in improving the public image of Chinatown. Most critical in this effort is to immediately implement the necessary physical street improvements which include repairing street lights and sidewalks and improving the maintenance of open space including Chinatown Gateway Park. In addition, police patrol of the Chinatown-South Cove specifically with regards to containing spillover of Combat Zone activity is important. A Neighborhood Crime Watch network could be implemented as a citizens' effort to address safety issues including robberies.

To ensure the vitality of the commercial area, parking needs and traffic congestion must be resolved. Suggestions include utilizing downtown area parking spaces and city allocation of surplus parking for community and commercial use.

Finally, the physical appearance of Chinatown can be enhanced with physical rehab and building improvements such as signs and

banners which affirm the historic and cultural identify of the Chinatown community. Public improvements including street repairs, tree plantings and other urban landscaping should be implemented as well.

Policy 2: Strengthen and enhance Chinatown's position in the Boston tourist industry.

The State, City, and Boston Chamber of Commerce should publicize Chinatown businesses, commercial and cultural activities in promotional materials, marketing schemes and strategies. A brochure on Chinatown businesses and arts and cultural facilities should be produced and distributed. A marketing consultant should be hired to develop strategies to enhance the public image of Chinatown. Furthermore, the formation of a Chinatown Chamber of Commerce which can advocate for the interests of Chinatown business enterprises should be pursued.

OBJECTIVE 2: Facilitate the expansion of the core Chinatown business district into neighboring areas including the Midtown/Cultural District, the Leather District and privately-owned properties in the central core of Chinatown (e.g., parking lot on Tyler and Harrison)

Policy 1: Create affordable retail, commercial, community and human service space in development occurring in and near the Chinatown/South Cove area

Community growth and expansion needs should be incorporated into Request for Proposals for development of parcels in and near Chinatown. Contributions beyond linkage payments should be generated towards a revolving loan fund for first time businesses. The organizational capacity and resources of community-based development agencies should enable the acquisition of property for community-based commercial development. Develop zoning regulations which encourages business incubators and light manufacturing ventures. In addition, public policies regarding commercial and residential development should include affordability guidelines, e.g., inclusionary zoning.

OBJECTIVE 3: Diversify Chinatown economic base

Policy 1: Expand the Chinatown neighborhood economy and services to better serve the Chinatown-South Cove residential area and Asian community at large and to strengthen Chinatown's role in the Greater Boston economy

Maximize the types and amounts of public and private resources available for neighborhood-based economic revitalization and development particularly for small innovative commercial development. Implement a market study of consumer/Chinatown user needs for commercial development (e.g., book stores, hardware stores, laundry facilities, xeroxing stores) Provision of business incubator space should be included in development occurring in and around Chinatown.

Policy 2: Protect and revitalize manufacturing jobs

Advocate for City and State agencies to implement studies documenting the viability of the Massachusetts manufacturing industries and enact public policy and allocation of resources to protect these jobs. In the event of a plant closure or factory shut-down, the Industrial Cooperative Association should be consulted on the possibility of a workers buy-out and conversion to a workers cooperative. Work with other communities with similar labor force characteristics to develop plans for small light manufacturing ventures.

Policy 3: Economic expansion of Chinatown commercial base should be oriented towards Boston industrial growth markets

The creation of Chinatown small businesses should be targeted towards those types of industrial and service-related industries which are experiencing the greatest degree of growth in the Boston economy. For example, the fastest growing occupation in Boston is janitorial services and a possible idea for economic expansion is to create a workers cooperative providing cleaning services.

OBJECTIVE 4: Strengthen and improve worker conditions and status with regards to wages, health insurance, work environment, employer/employee, and day care needs

Policy 1: Encourage membership and participation in worker advocacy organizations including unions.

Worker advocacy organizations such as unions should be introduced to Chinatown workers as a viable method for improving their work conditions and providing for such "benefits" as health insurance. Identify public resources for funding and staffing of worker advocacy organizations.

Policy 2: Facilitate dialogue and working relationship between employers and employees to improve the work environment

Public education on employer/employee relationships including workers rights, employer obligations (e.g., health concerns at the workplace) should be wide-spread and bilingual.

OBJECTIVE 5: Increase and improve the level of labor market participation of the present Chinatown/South Cove workforce

Policy 1: Increase services such as employment and skill training programs, ESL classes and vocational ESL instruction

Create and implement job training programs which are culturally sensitive and train for jobs with career ladders and/or professional and managerial jobs.

Policy 2: Facilitate, coordinate and improve information distribution on employment opportunities

Create a job bank and systematize collection and publication of employment opportunities through interagency cooperation, the production and distribution of a monthly job bulletin. Further, enhance community outreach through the press and community bulletin boards.

Policy 3: Address institutionalized barriers to employment including racism and occupational segmentation

Participate in city-wide coalitions which enforce and monitor State and City affirmative action guidelines. Institutionalize community participation and input in public agencies such as the Mayor's Office of Jobs and Community Services and the Jobs

Training Trust. Increase funding and staffing for worker advocacy organizations. Develop and distribute multicultural educational materials on workers rights.

DRAFT CHINATOWN COMMUNITY PLAN¹

FOR

COMMUNITY SERVICES

Overview:

Community-based organizations and human service agencies are important community institutions providing much needed services to not only Chinatown residents but the Greater Boston Asian community as well. With continued growth and increasing diversification of the Massachusetts Asian population, the demand for community services is rising dramatically.

The growing demand for both existing and new services reflect the social and economic hardship which the clientele population is often subjected to. Thus, it is critical to increase the organizational capacity of community service agencies, create and secure affordable community space and facilities, and expand funding for programs.

The Chinatown Community Plan for Community Services intends to preserve and enhance the capacity of community service providers to meet the growing demand for services generated by an expanding Asian community in Boston.

¹. The Chinatown Community Plan is being conducted jointly by the Chinatown-South Cove Neighborhood Council and the Boston Redevelopment Authority in two phases. The Draft Plan which concludes Phase I of the planning process entails community consensus on overall goals, objectives, and policies. Feasibility study and public discussions will ensue during Phase II and result in a community-based comprehensive development plan for the Chinatown neighborhood.

**DRAFT CHINATOWN COMMUNITY PLAN
FOR
COMMUNITY SERVICES**

Overall Goal: Enable community members and residents to be self-sufficient and work towards individual and community self-determination

OBJECTIVE 1: Facilitate community awareness of available services and how to access and utilize programs

Policy 1: Initiate public education on available services in Chinatown and workers rights, civil/legal rights, and public programs e.g., SSI and welfare

Although a great demand already exists for community services, outreach efforts which coordinate the preparation and distribution of materials describing the types of programs community agencies provide is necessary to ensure that all community members are fully aware of the resources available to them. Furthermore, such information as individual civil/legal and workers rights need to be systematically distributed possibly through a visible and distinct information center. In regards to systematic dissemination of employment opportunities to maximize the community's access to employment information, a job bank can be formed to identify and coordinate information and establish a referral system between employers, potential employees, public agencies and community agencies.

OBJECTIVE 2: Expand and improve existing programs and create new programs which are presently non-existent in Chinatown

Policy 1: Initiate and encourage interagency cooperation to address community needs and plan for the most effective utilization of existing resources

Support existing efforts such as the Executive Director Council to discuss long range planning objectives and prioritize needs for new programs. This advisory group can identify outstanding organizational needs, potential areas for collaboration and ways to share and expand resources.

Policy 2: Upgrade and increase programs which address:

- 1) language barriers
- 2) skill training
- 3) supportive services including housing advocacy,

- immigration orientation, and counselling.
- 4) Child care
 - 5) Youth and Recreational needs
 - 6) Health Insurance
 - 7) Elderly services
 - 8) Health Care
 - 9) Volunteer development

Encourage collaborative programming and joint endeavors to eliminate unnecessary competition for funding. Increase public awareness of the service needs of the Asian community to demonstrate the outstanding need for more funding and resources. In addition, explore innovative methods of service provision, e.g., home-based daycare.

Policy 2: Create and expand new programs

Project future program needs and organizational growth and coordinate agency proposals to eliminate unnecessary competition while maximizing the effectiveness of programs. Coordinate new program planning including job training programs to meet labor market trends and target population needs.

OBJECTIVE 3: Enhance and increase the financial, physical and human resources of community service agencies

Policy 1: Allocate community space for classrooms, recreational facilities, offices and daycare in new construction or rehabilitation occurring in the Chinatown-South Cove area.

Incorporate the provision of affordable community space in the Request for Proposal for development of the remaining publicly held sites in Chinatown and any neighboring developments, e.g., Midtown/Cultural District and Parcel to Parcel Linkage project. Initiate interagency cooperation to share existing resources and facilities. Prioritize for community organizations with emergency status, e.g., South Cove YMCA.

Policy 2: Increase financial resources from the public and private sectors

Maximize the community's leverage to negotiate for contributions beyond linkage from private developers. Incorporate the concept of funding for community services into Request for Proposals for publicly held land. Research alternative funding opportunities such as the Community Reinvestment Act. Formalize the community's relationship with such public agencies as the Job Training Trust and the Mayor's Office of Jobs and Community Services. Furthermore, create accountability mechanisms with

these and other public agencies such as Division of Employment Securities, Department of Public Welfare regarding the delivery of services and resources. Advocate for proposed daycare linkage fee requirement from private developers.

Policy 3: Enhance the organizational capacity of community service providers by building and maintaining qualified bilingual staff

Improve the wage scales and benefits for employees. Provide training in management skills and other educational opportunities to refine staff skills. Increase community service providers organizational budgets to permit increasing staff members and be more competitive in the labor market to attract qualified workers.

APPENDIX D

CHINATOWN HOUSING IMPROVEMENT PROGRAM

PRELIMINARY DEVELOPMENT PROGRAM

<u>Parcel</u>	<u>Location</u>	<u>Site Area</u>	<u>Owner-ship</u>	<u>Potential # of Units</u>	<u>Estimated Development</u>	<u>Existing Usage</u>
R-3/R-3A	Oak St Washington St Marginal Rd	80,000 sf	BRA	225	1988	Chinatown Boys & Girls Club Parking Lot Playground Community Garden
R-1	Tyler St Hudson St Harvard St	19,355	BRA	80	1990	South Cove YMCA Lodging House
P-3/P-4	Oak St Washington St Nassau St	20,000	BRA MBTA	80	1989	Vacant Building Parking Lot
P-2	Tyler St Harrison Ave	17,000	TNEMC BRA .	60	1989	Parking Lot
P-12A	Washington St	8,000	BRA	30	1989	Don Bosco

				475		

APPENDIX E

PUBLIC DISCLOSURE FORMS

REDEVELOPER'S STATEMENT FOR PUBLIC DISCLOSURE ¹

A. REDEVELOPER AND LAND

1. a. Name of Redeveloper:

b. Address and ZIP Code of Redeveloper:

c. IRS Number of Redeveloper:

2. The land on which the Redeveloper proposes to enter into a contract for, or understanding with respect to the purchase or lease of land from

(Name of Local Public Agency)

in _____

(Name of Urban Renewal or Redevelopment Project Area)

in the City of _____, State of _____,
is described as follows ²

3. If the Redeveloper is not an individual doing business under his own name, the Redeveloper has the status indicated below and is organized or operating under the laws of _____

- A corporation.
- A nonprofit or charitable institution or corporation.
- A partnership known as _____
- A business association or a joint venture known as _____
- A Federal, State, or local government or instrumentality thereof.
- Other (explain) _____

4. If the Redeveloper is not an individual or a government agency or instrumentality, give date of organization _____

5. Names, addresses, title of position (if any), and nature and extent of the interest of the officers and principal member shareholders, and investors of the Redeveloper, other than a government agency or instrumentality, are set forth as follows:

¹ If space on this form is inadequate for any requested information, it should be furnished on an attached page which is referred to under the appropriate numbered item on the form.² Any convenient means of identifying the land (such as block and lot numbers or street boundaries) is sufficient. A description by metes and bounds or other technical description is acceptable, but not required.

- a. If the Redeveloper is a corporation, the officers, directors or trustees, and each stockholder owning more than 10% of any class of stock¹
- b. If the Redeveloper is a nonprofit or charitable institution or corporation, the members who constitute the board of trustees or board of directors or similar governing body.
- c. If the Redeveloper is a partnership, each partner, whether a general or limited partner, and either the percent of interest or a description of the character and extent of interest.
- d. If the Redeveloper is a business association or a joint venture, each participant and either the percent of interest or a description of the character and extent of interest.
- e. If the Redeveloper is some other entity, the officers, the members of the governing body, and each person having an interest of more than 10%.

NAME, ADDRESS, AND ZIP CODE

POSITION TITLE (if any) AND PERCENT OF INTEREST OR
DESCRIPTION OF CHARACTER AND EXTENT OF INTEREST

6. Name, address, and nature and extent of interest of each person or entity (not named in response to Item 5) who has a beneficial interest in any of the shareholders or investors named in response to Item 5 which gives such person or entity more than a computed 10% interest in the Redeveloper (for example, more than 20% of the stock in a corporation which holds 50% of the stock of the Redeveloper; or more than 50% of the stock in a corporation which holds 20% of the stock of the Redeveloper):

NAME, ADDRESS, AND ZIP CODE

DESCRIPTION OF CHARACTER AND EXTENT OF INTEREST

7. Names (if not given above) of officers and directors or trustees of any corporation or firm listed under Item 5 or Item 6 above:

B. RESIDENTIAL REDEVELOPMENT OR REHABILITATION

(The Redeveloper is to furnish the following information, but only if land is to be redeveloped or rehabilitated in whole or in part for residential purposes.)

¹ If a corporation is required to file periodic reports with the Federal Securities and Exchange Commission under Section 13 of the Securities Exchange Act of 1934, so state under this Item 5. In such case, the information referred to in this Item 5 and in Items 6 and 7 is not required to be furnished.

1. State the Redeveloper's estimates, exclusive of payment for the land, for:

- a. Total cost of any residential redevelopment. \$
- b. Cost per dwelling unit of any residential redevelopment. \$
- c. Total cost of any residential rehabilitation \$
- d. Cost per dwelling unit of any residential rehabilitation \$

2. a. State the Redeveloper's estimate of the average monthly rental (if to be rented) or average sale price (if to be sold) for each type and size of dwelling unit involved in such redevelopment or rehabilitation:

<u>TYPE AND SIZE OF DWELLING UNIT</u>	<u>ESTIMATED AVERAGE MONTHLY RENTAL</u>	<u>ESTIMATED AVERAGE SALE PRICE</u>
	\$	\$

b. State the utilities and parking facilities, if any, included in the foregoing estimates of rentals:

c. State equipment, such as refrigerators, washing machines, air conditioners, if any, included in the foregoing estimates of sales prices:

CERTIFICATION

I (We)¹ _____
 certify that this Redeveloper's Statement for Public Disclosure is true and correct to the best of my (our) knowledge and belief.²

Dated: _____

Dated: _____

Signature

Signature

Title

Title

Address and ZIP Code

Address and ZIP Code

¹ If the Redeveloper is an individual, this statement should be signed by such individual; if a partnership, by one of the partners; if a corporation or other entity, by one of its chief officers having knowledge of the facts required by this statement.
² Penalty for False Certification: Section 1001, Title 18, of the U.S. Code, provides a fine of not more than \$10,000 or imprisonment of not more than five years, or both, for knowingly and willfully making or using any false writing or document, knowing the same to contain any false, fictitious or fraudulent statement or entry in a matter within the jurisdiction of any Department of the United States.

REDEVELOPER'S STATEMENT OF QUALIFICATIONS AND FINANCIAL RESPONSIBILITY

(For Confidential Official Use of the Local Public Agency and the Department of Housing and Urban Development. Do Not Transmit to HUD Unless Requested or Item 8b is Answered "Yes.")

1. a. Name of Redeveloper:

b. Address and ZIP Code of Redeveloper:

2. The land on which the Redeveloper proposes to enter into a contract for, or understanding with respect to, the purchase or lease of land from

_____ (Name of Local Public Agency)

in _____ (Name of Urban Renewal or Redevelopment Project Area)

is the City of _____, State of _____, is described as follows:

3. Is the Redeveloper a subsidiary of or affiliated with any other corporation or corporations or any other firm or firms? YES NO

If Yes, list each such corporation or firm by name and address, specify its relationship to the Redeveloper, and identify the officers and directors or trustees common to the Redeveloper and such other corporation or firm.

4. a. The financial condition of the Redeveloper, as of _____, 19____, is as reflected in the attached financial statement.

(NOTE: Attach to this statement a certified financial statement showing the assets and the liabilities, including contingent liabilities, fully itemized in accordance with accepted accounting standards and based on a proper audit. If the date of the certified financial statement precedes the date of this submission by more than six months, also attach an interim balance sheet not more than 60 days old.)

b. Name and address of auditor or public accountant who performed the audit on which said financial statement is based:

5. If funds for the development of the land are to be obtained from sources other than the Redeveloper's own funds, a statement of the Redeveloper's plan for financing the acquisition and development of the land:

6. Sources and amount of cash available to Redeveloper to meet equity requirements of the proposed undertaking:

a. In banks:

<u>NAME, ADDRESS, AND ZIP CODE OF BANK</u>	<u>AMOUNT</u>
	\$

b. By loans from affiliated or associated corporations or firms:

<u>NAME, ADDRESS, AND ZIP CODE OF SOURCE</u>	<u>AMOUNT</u>
	\$

c. By sale of readily salable assets:

<u>DESCRIPTION</u>	<u>MARKET VALUE</u>	<u>MORTGAGES OR LIENS</u>
	\$	\$

7. Names and addresses of bank references:

8. a. Has the Redeveloper or (if any) the parent corporation, or any subsidiary or affiliated corporation of the Redeveloper or said parent corporation, or any of the Redeveloper's officers or principal members, shareholders or investors, or other interested parties (as listed in the responses to Items 5, 6, and 7 of the Redeveloper's Statement for Public Disclosure and referred to herein as "principals of the Redeveloper") been adjudged bankrupt, either voluntary or involuntary, within the past 10 years? YES NO

If Yes, give date, place, and under what name.

b. Has the Redeveloper or anyone referred to above as "principals of the Redeveloper" been indicted for or convicted of any felony within the past 10 years? YES NO

If Yes, give for each case (1) date, (2) charge, (3) place, (4) Court, and (5) action taken. Attach any explanation deemed necessary.

9. a. Undertakings, comparable to the proposed redevelopment work, which have been completed by the Redeveloper or any of the principals of the Redeveloper, including identification and brief description of each project and date of completion:

b. If the Redeveloper or any of the principals of the Redeveloper has ever been an employee, in a supervisory capacity, for construction contractor or builder on undertakings comparable to the proposed redevelopment work, name of such employee, name and address of employer, title of position, and brief description of work:

10. Other federally aided urban renewal projects under Title I of the Housing Act of 1949, as amended, in which the Redeveloper or any of the principals of the Redeveloper is or has been the redeveloper, or a stockholder, officer, director or trustee, or partner of such a redeveloper:

11. If the Redeveloper or a parent corporation, a subsidiary, an affiliate, or a principal of the Redeveloper is to participate in the development of the land as a construction contractor or builder:

a. Name and address of such contractor or builder:

b. Has such contractor or builder within the last 10 years ever failed to qualify as a responsible bidder, refused to enter into a contract after an award has been made, or failed to complete a construction or development contract? YES NO

If Yes, explain:

c. Total amount of construction or development work performed by such contractor or builder during the last three years: \$ _____.

General description of such work:

d. Construction contracts or developments now being performed by such contractor or builder:

IDENTIFICATION OF
CONTRACT OR DEVELOPMENT

LOCATION

AMOUNT

DATE TO BE
COMPLETED

\$

e. Outstanding construction-contract bids of such contractor or builder:

AWARDING AGENCY

AMOUNT

\$

DATE OPENED

12. Brief statement respecting equipment, experience, financial capacity, and other resources available to such contractor or builder for the performance of the work involved in the redevelopment of the land, specifying particularly the qualifications of the personnel, the nature of the equipment, and the general experience of the contractor:

13. a. Does any member of the governing body of the Local Public Agency to which the accompanying bid or proposal is being made or any officer or employee of the Local Public Agency who exercises any functions or responsibilities in connection with the carrying out of the project under which the land covered by the Redeveloper's proposal is being made available, have any direct or indirect personal interest in the Redeveloper or in the redevelopment or rehabilitation of the property upon the basis of such proposal? YES NO

If Yes, explain.

b. Does any member of the governing body of the locality in which the Urban Renewal Area is situated or any other public official of the locality, who exercises any functions or responsibilities in the review or approval of the carrying out of the project under which the land covered by the Redeveloper's proposal is being made available, have any direct or indirect personal interest in the Redeveloper or in the redevelopment or rehabilitation of the property upon the basis of such proposal? YES NO

If Yes, explain.

14. Statements and other evidence of the Redeveloper's qualifications and financial responsibility (other than the financial statement referred to in Item 4a) are attached hereto and hereby made a part hereof as follows:

CERTIFICATION

I (We)¹ _____

certify that this Redeveloper's Statement of Qualifications and Financial Responsibility and the attached evidence of the Redeveloper's qualifications and financial responsibility, including financial statements, are true and correct to the best of my (our) knowledge and belief.²

Dated: _____

Dated: _____

Signature

Signature

Title

Title

Address and ZIP Code

Address and ZIP Code

¹ If the Redeveloper is a corporation, this statement should be signed by the President and Secretary of the corporation; if an individual, by such individual; if a partnership, by one of the partners; if an entity not having a president and secretary, by one of its chief officers having knowledge of the financial status and qualifications of the Redeveloper.
² Penalty for False Certification: Section 1001, Title 18, of the U.S. Code, provides a fine of not more than \$10,000 or imprisonment of not more than five years, or both, for knowingly and willfully making or using any false writing or document, knowing the same to contain any false, fictitious or fraudulent statement or entry in a matter within the jurisdiction of any Department

DISCLOSURE STATEMENT CONCERNING BENEFICIAL INTEREST
REQUIRED BY SECTION 40J OF CHAPTER 7 OF THE GENERAL LAWS

- (1) Location: _____
- (2) Grantor or Lessor: _____
- (3) Grantee or Lessee: _____
- (4) I hereby state, under the penalties of perjury, that the true names and addresses of all persons who have or will have a direct or indirect beneficial interest in the above listed property are listed below in compliance with the provisions of Section 40J of Chapter 7 of the General Laws (see attached Statute).

NAME AND RESIDENCE OF ALL PERSONS WITH SAID BENEFICIAL INTEREST:

- (5) The undersigned also acknowledges and states that none of the above listed individuals is an official elected to public office in the Commonwealth of Massachusetts, nor is an employee of the State Department of Capitol Planning and Operations.

SIGNED under the penalties of perjury.

Signed: _____

Date: _____

§ 40J. Disclosure statements of persons having beneficial interest in real property

No agreement to rent or to sell real property to or to rent or purchase real property from a public agency, and no renewal or extension of such agreement, shall be valid and no payment shall be made to the lessor or seiler of such property unless a statement, signed, under the penalties of perjury, has been filed by the lessor, lessee, seiler or purchaser, and in the case of a corporation by a duly authorized officer thereof giving the true names and addresses of all persons who have or will have a direct or indirect beneficial interest in said property with the deputy commissioner of capital planning and operation. The provisions of this section shall not apply to any stockholder of a corporation the stock of which is listed for sale to the general public with the securities and exchange commission, if such stockholder holds less than ten per cent of the outstanding stock entitled to vote at the annual meeting of such corporation.

A disclosure statement shall also be made in writing, under penalty of perjury, during the term of a rental agreement in case of any change of interest in such property, as provided for above, within thirty days of such change.

Any official elected to public office in the commonwealth, or any employee of the division of capital planning and operations disclosing beneficial interest in real property pursuant to this section, shall identify his/her position as part of the disclosure statement. The deputy commissioner shall notify the state ethics commission of such names, and shall make copies of any and all disclosure statements received available to the state ethics commission upon request.

The deputy commissioner shall keep a copy of each disclosure statement received available for public inspection during regular business hours.

Added by St.1980, c. 579, § 12.

1980 Enactment. St.1980, c. 579, § 12, was approved July 16, 1980, and by § 66 made effective July 1, 1981.

See, also, note under § 39A of this chapter.

Library References

States — 49.

C.J.S. §§ 145, 149, 150.

APPENDIX F

BOSTON REDEVELOPMENT AUTHORITY INFORMATIONAL SUMMARY OF AFFIRMATIVE MARKETING

- I. Affirmative marketing is required by the City's Fair Housing and Employment Plan for all housing units in developments of five or more units which receive any form of financial assistance, or recommendations for exemptions to the Zoning Commission, from the Boston Redevelopment Authority (BRA).
- II. An affirmative marketing plan must be prepared by the developer to insure that minority residents and female heads of household have information about and access to housing opportunities generated through BRA participation. The affirmative marketing plan must be approved by the BRA before the developer or any agent of the developer may begin any marketing.
- III. Affirmative marketing involves advertising and outreach to minorities as a means of making information on housing opportunities known, thereby increasing access to housing being created throughout the city through construction, rehabilitation, or conversion.
- IV. Affirmative marketing plans and successful outreach to minorities and female heads of households will differ, depending upon the location, cost, size and number of housing units in the development to be created. Affirmative marketing efforts will therefore vary in order to achieve the common goal of wide and effective outreach.
- V. Affirmative marketing and outreach will take a variety of forms. It may include advertising in the media-newspapers, radio, TV; informational mailings; distribution of circulars; and signs at the construction site and sales/rental office.

Newspaper advertisements shall be placed in at least one major daily newspaper and in not less than one paper for each of the following minority communities in Boston: Black, Hispanic and Asian. [Staff will provide more detailed information but the following papers are identified as having wide circulation among minority residents: Bay State Banner (Blacks), El Mundo and/or La Semana (Hispanics), and the Sampan (Asian-Americans).] Ads in non-English papers shall be in the language of the

paper. Developers are encouraged to use other community papers as well.

If any other media are used for general advertising, minority owned, minority staffed and/or minority programmed outlets shall also be used. If ads or commercials for housing are used with human models or pictorial representation, models shall represent minority as well as non-minority persons.

Informational mailings shall be directed to agencies, centers and/or organizations who are able to circulate the information to their clientele, members and/or users. (Information on affordable units must be circulated in part through housing counseling agencies designated by the Authority; lists are obtainable from BRA staff.) Distribution of informational materials to neighborhood and community groups is considered a supplementary effort to mailings in the marketing of affordable units.

For market rate units, developers must use mailing lists of professional and organizational groups whose members represent potential applicants. Some information and mailing lists are available through staff; developers are encouraged to develop additional contacts through other sources.

Signs must be posted at the construction site which are easily readable from the street, which provide information on the cost, size and number of housing units in the project, and list a company, address and telephone number where interested persons may obtain more information.

All signs, letterheads, or other materials containing marketing information must have the HUD Fair Housing logo and slogan (Equal Housing Opportunity) appearing on the signs, ads, stationary pamphlets or other forms and sufficient in size to be legible.

- VI. More detailed reviews of proposed affirmative marketing plans will be conducted for affordable units, and meetings with staff representatives are required at an early stage of the development process to insure that developers have adequate information with which to develop their marketing plan.
- VII. Any questions concerning requirements with regard to eligibility and/or criteria for selection of tenants or buyers of affordable units must be resolved and incorporated into the fair marketing plan for approval by the BRA and the Boston Fair Housing Commission (BFHC) so that this information can be incorporated into advertising and outreach information.

- VIII. Marketing efforts may not begin until after approval of the Affirmative Fair Housing and Marketing Plan by the BRA. Please note that under a Memorandum of Agreement executed between the BRA and the BFHC (December 8, 1987), documents to be submitted for BRA approval include a non-discrimination statement and the Affirmative Marketing Plan. Plans will be jointly reviewed with the BFHC; any proposals utilizing any degree of neighborhood preference must receive BFHC and BRA approval.
- IX. The BRA will monitor compliance with the affirmative marketing plan as approved; the undertaking of such reviews will generally occur jointly with BFHC. A determination of compliance must be received by the developer before the developer or any agent selects or enters into any legal contract with any prospective tenant or buyer for either market rate or affordable units.
- X. For further information or assistance, please contact Joan Smith at the Boston Redevelopment Authority (722-4300). Cyndi Koebert and other staff of the Boston Fair Housing Commission are also available to answer questions (725-4408).

NON-DISCRIMINATION AND AFFIRMATIVE MARKETING PLAN
APPROVAL STATEMENT

As a condition of receiving BRA-controlled funds, land or other benefits, I, _____, agree not to discriminate or permit discrimination, upon the basis of race, color, religious creed, marital status, sex, age, ancestry, sexual preference, military status, handicap, children, national origin, or source of income in the sale, rental, or use and occupancy of the property located at _____

Furthermore, I agree to comply with the City's Affirmative Marketing policy, and to maintain a record of all newspaper ads, outreach letters, translations, leaflets, and any other outreach efforts undertaken in relation to the Affirmative Marketing Plan as approved. These records will be available for review upon request by BRA prior to tenant/buyer selection.

I understand that I shall be able to proceed with completion of my project upon completion and determination of compliance of every step outlined in the attached Affirmative Marketing Plan. Compliance with the Affirmative Marketing Plan shall be determined by BRA. Tenant/buyer selection cannot occur until BRA has determined compliance. If I have not adequately complied with the City-approved plan, I may be required to conduct additional outreach or marketing efforts as determined by BRA and BFHC prior to rent up or sale.

Date

Developer

We concur that the materials submitted in relation to the above development constitute an acceptable Affirmative Marketing Plan and that one developer may proceed to its completion provided that s/he complies with all steps outlined. The Boston Redevelopment Authority shall be responsible for monitoring and shall confer with Boston Fair Housing Commission in determination relative to compliance.

Date

Boston Fair Housing Commission

Date

Boston Redevelopment Authority

MEMORANDUM OF AGREEMENT

between

THE BOSTON REDEVELOPMENT AUTHORITY

and

THE BOSTON FAIR HOUSING COMMISSION

This agreement is entered into this 8th day of December 1986 between the Boston Redevelopment Authority (BRA), and the Boston Fair Housing Commission (BFHC), to implement the City of Boston Fair Housing and Employment Plan (Fair Housing Plan).

It is mutually agreed that the following provisions be incorporated in the Memorandum of Agreement:

I. Purpose of Agreement

The purpose of this Memorandum of Agreement is to provide for cooperation and coordination of the activities between the BRA and the BFHC in implementing the requirements and commitments contained in the Fair Housing Plan. In particular, it is the intent of the signatories to specify through this agreement the role of each party in carrying out the mandates of the Fair Housing Plan; it is also the intent of the parties to maximize their respective fair housing efforts through sustained interagency communication and to establish interagency procedures to ensure specific efforts to further the fair housing goals established in the Fair Housing Plan.

II. City Officials' Fair Housing Committee

In furtherance of the above stated purpose, there shall be a City Officials' Fair Housing Committee (COFHC) established, the membership of

which shall be drawn from the city agencies involved in housing. The chief executive officer of each respective agency shall represent the agency.

III. Resolution of Disputes Between BRA and BFHC

Any material dispute between the parties to this agreement on policy matters, shall be submitted to the BRA Director and the BFHC Executive Director for resolution. In the event a resolution cannot be achieved, the matter shall be submitted to the Boston Redevelopment Authority Board, after which such matter shall be taken up by the respective Chairpersons of the BFHC and the BRA, or their designees, and within a thirty (30) day consultation period, recommendations shall be submitted to the BRA Board for resolution.

IV. Affirmation Fair Housing Marketing Plan (AFHMP)

- (1) The BFHC will advise the BRA on fair housing related issues involving the creation or rehabilitation of housing projects on BRA-designated land of five (5) or more units (covered projects) in the form of recommendations to the BRA.
- (2) The BRA will advise developers of AFHMP requirements via program designs, requests for proposals (RFPs), and other forms of communications, as stated in the Fair Housing Plan.
- (3) The BRA will provide the BFHC with a copy of all covered project RFPs, which shall be used for purposes of administering this Fair Housing Plan and not for any other purposes.

- (4) Prior to granting a developer tentative designation for a covered project, the BRA will notify the BFHC of the following information:
- a) the name and address of any and all persons or parties involved in the project;
 - b) the exact address of the subject property(ies);
 - c) the proposed use of the property.

As a general rule, such information should be provided fifteen (15) days prior to tentative designation.

- (5) The BFHC will screen the developer to determine whether any outstanding Equal Opportunity/Fair Housing complaints exist. If such a complaint does exist, the BFHC will try to resolve it through mediation and hearing procedures. If a solution is not reached, the BFHC may advise the BRA that the developer should not be selected for tentative designation. The BFHC may also recommend that the BRA not select the developer for tentative designation if the developer has a demonstrated history of discriminatory practices in housing. The BRA will give full faith and credit to the BFHC's findings in determining whether to select the developer for tentative designation. If the BFHC recommends against the tentative designation of the developer, no action on such designation shall occur for a minimum period of thirty (30) days. A demonstrated history of discriminatory practices in housing shall be comprised of one or more of the following: legal judgements, administrative rulings, or a series of independent, verifiable and substantive complaints that as a whole would permit the reasonable inference that discriminatory practices have been demonstrated by the developer. Recommendations, favorable or not, will be received by the BRA within fifteen (15) days of notification. Any recommendation that is not received within 15 days will be presumed favorable.

- (6) Prior to the final disposition of property in a covered project, the BRA will require developers to submit an AFHMP that complies with Section V of this agreement. The developer will also be required by the BRA to sign a non-discrimination statement. The BRA will forward copies of AFHMP plans and non-discrimination statements to the BFHC.

V. Elements of AFHMPs

Each satisfactory AFHMP will include the following elements:

- (1) Outreach Efforts. Outreach efforts will consist of:
- a) requirements that a developer advertise the availability of housing once monthly for a period of three (3) months prior to and three (3) months beyond the actual completion date in citywide and local newspapers;
 - b) requirements that a developer send outreach letters to all appropriate housing counselling agencies which assist minorities and low and moderate income families;
 - c) in particular cases, requirements that the developer undertake additional outreach efforts due to the nature or location of the project.
- (2) Anti-Displacement. Up to seventy percent (70%) of all units in the development may be targeted for neighborhood residents when such targeting is necessary to mitigate displacement or gentrification pressures, and when neighborhood resident preferences result in a fair distribution of units among all city residents. However, in no case may less than thirty percent (30%) of all units be marketed citywide. Additionally, developers in no case may exclude applications for available

units from non-neighborhood residents. Plans for the selection of tenants where the neighborhood resident preference is used as a selection criterion shall be approved by the BFHC prior to the issuance of a certificate of completion.

VI. Measures for Compliance

- (1) The BRA will require the developer to submit periodic documentation of compliance, which will include but not be limited to: copies of invoices for advertising space; acknowledgement of receipt of outreach letters from housing counselling agencies; and a report indicating the percentage of units targeted for residents and the actual number of resident-occupied units. Satisfactory compliance with Section V shall be a condition precedent to the issuance of a certificate of completion. If, in the opinion of the BRA, the developer fails to supply sufficient documentation, said failure may constitute grounds for a determination of non-compliance.
- (2) The BFHC may initiate its own review of developer compliance with AFHMP and tenant selection requirements. Such review may include tests, interviews, and record review at the discretion of the BFHC. To assist in such a review, the BRA will provide the BFHC with whatever relevant information the BRA has obtained from the developer.

VII. Procedures for Action Upon Finding of Non-Compliance

- (1) A developer who fails to comply with AFHMP requirements will be required to conduct additional outreach efforts to satisfy AFHMP requirements. Such failure may also constitute grounds for not selecting the developer to undertake future covered projects.

- (2) If the BFHC determines that a developer is not in compliance with the AFHMP, then the BRA and BFHC will jointly determine what further steps the developer must take to achieve compliance.
- (3) Notwithstanding any actions taken pursuant to this agreement, the BFHC shall independently seek to enforce all fair housing provisions contained in its enabling ordinance and its regulations, and in any subsequent ordinances and regulations.

VIII. Evaluation of AFHMP Effectiveness

- (1) Purpose. To ascertain whether the AFHMP procedures are effective in ensuring that all groups in a marketing area have the knowledge and opportunity to obtain units in a development, the COFHC will periodically review and evaluate the performance of the AFHMP program.
- (2) Evaluation Standards. The COFHC will conduct periodic review of the City's progress in conducting marketing outreach to ensure equal access for all residents.
 - a) With marketing outreach data gathered by the BRA and the City, the COFHC will examine project applicant pools to determine whether the Affirmative Fair Housing Marketing Plan is demonstrating positive movement in ensuring equal access to all neighborhoods for all residents. Based on its assessment of applicant pool trends, the COFHC may recommend to the City that additional steps be undertaken in the AFHMP.
 - b) In relation to BRA projects, the COFHC will evaluate the composition of new developments and determine whether project occupancy rates reflect the composition of the City as a whole. On the basis of occupancy trends, the COFHC may make recommendations for changes in future AFHMPs.

- c) The COFHC will submit to the City and BRA Board an annual report summarizing affirmative fair housing marketing efforts and accomplishments.

IX. Auditing and Reporting

- (1) BRA Quarterly Report to BFHC. In relation to BRA projects the BRA will submit a quarterly report to the BFHC concerning the success of affirmative marketing efforts. The BFHC will in turn prepare a report on compliance with the Boston Fair Housing Plan for submission to the MCAD, upon approval of the Mayor; a copy of such report shall be submitted to the BRA Board.
- (2) Content of Report/Standards to Measure Compliance. At a minimum the quarterly report will include the number of housing starts in covered projects, the location of such housing starts, copies of all affirmative marketing agreements, and the identity of the individual(s) within the BRA assigned to implement the Fair Housing Plan and this contract. Periodically, the BFHC may request additional information from the BRA to determine compliance with the Fair Housing Plan. Such requests will be in writing.

X. Training and Information Sharing

The BFHC will provide training to the BRA staff on fair housing issues, civil rights laws and regulations, and the BRA will provide BFHC staff with information on the Authority's programs and policies. Each agency will respond in a timely manner to information requests.

IX. Effective Dates

This memorandum of agreement will become effective on the date that it is executed by both parties and will apply to all covered projects approved from that date forward.

X. Agency Powers

Nothing in this agreement is intended to abridge or constrain the statutory powers and authority of either the BRA or the BFHC. Each agency should independently exercise its powers to enforce all statutes, ordinances, regulations, and contracts that further its fair housing policies.

Approved as to form:

Robert T. ...
Chief General Counsel

BOSTON REDEVELOPMENT AUTHORITY

Stephen Coyle
Stephen Coyle, Director
December 8, 1986
Date

BOSTON FAIR HOUSING COMMISSION

Ernest B. Gutierrez, Jr.
Ernest B. Gutierrez, Jr.
Executive Director
December 8, 1986
Date

7142 025



EQUAL HOUSING
OPPORTUNITY

The Boston Fair Housing Commission Works For All Of Us



IN THE CITY OF BOSTON, IT IS ILLEGAL TO DISCRIMINATE AGAINST ANY PERSON IN THE RENTAL OR SALES OF ANY HOUSING BECAUSE OF:

- race
- color
- religion
- creed
- sex
- national origin
- marital status
- military status
- children
- handicap
- age
- sexual preference
- source of income (including Section 8, AFDC or welfare)

LANDLORDS, SELLERS, AND AGENTS MUST APPLY STANDARDS UNIFORMLY AND CONSIDER APPLICANTS ON CRITERIA SUCH AS 1) ABILITY TO PAY AND 2) ABILITY TO RESPECT THE RIGHTS OF OTHERS.

Discrimination may be subtle and may take many forms. It is against the law to:

- discriminate in advertising, oral or written inquiries
- discourage or refuse to allow a person to apply for an available unit
- deny a unit due to the presence of lead paint
- refuse an affordable rental unit to an applicant holding a housing subsidy certificate
- spread rumors of racial change to stimulate property sales
- deny mortgage loans or insurance to specific neighborhoods

THE LAW APPLIES TO ALL TYPES OF HOUSING IN BOSTON INCLUDING OWNER OCCUPIED ONE, TWO AND THREE FAMILY DWELLINGS. THERE ARE NO EXCEPTIONS.

If you feel you've been discriminated against in housing, contact:
The Boston Fair Housing Commission, Room 957, City Hall, Boston, MA 02201

725-4408

